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ABSTRACT

All aspects of school elections ranging from the nuts and bolts of campaign organization and media relations to effective long-term strategies to sustain community support for school funding and board member leadership comprise the 11 chapters of this two-part book. The first part offers an overview of board member election campaigns and effective general strategies and organizational methods. All the recommendations require relatively modest financing compared to other public elections. The second part pertains to school referendum campaigns and discusses the subject of elections in greater detail. Sample campaign materials, job descriptions, and timelines are easily adaptable to a school system's needs. This part presents its basic political strategy in two chapters titled "11 Lessons in Success" and "Steps to Success." Then two types of campaigns are outlined--the "Yes Vote" and the "Community Crusade," with subsequent chapters devoted to the media, campaign literature, finances, organization, speeches, and followup activities. (JAM)

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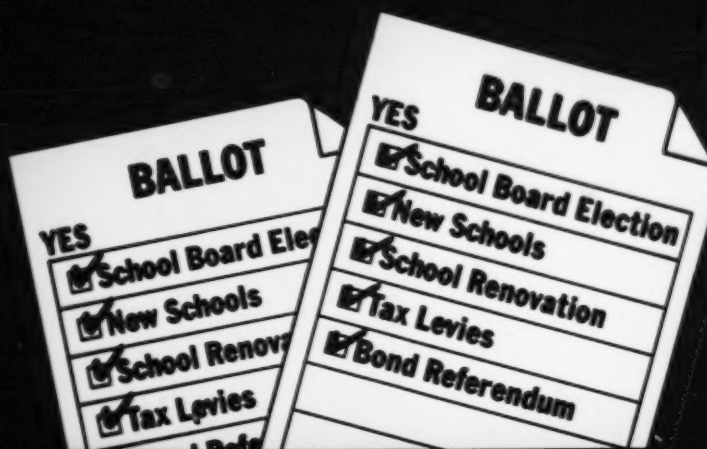
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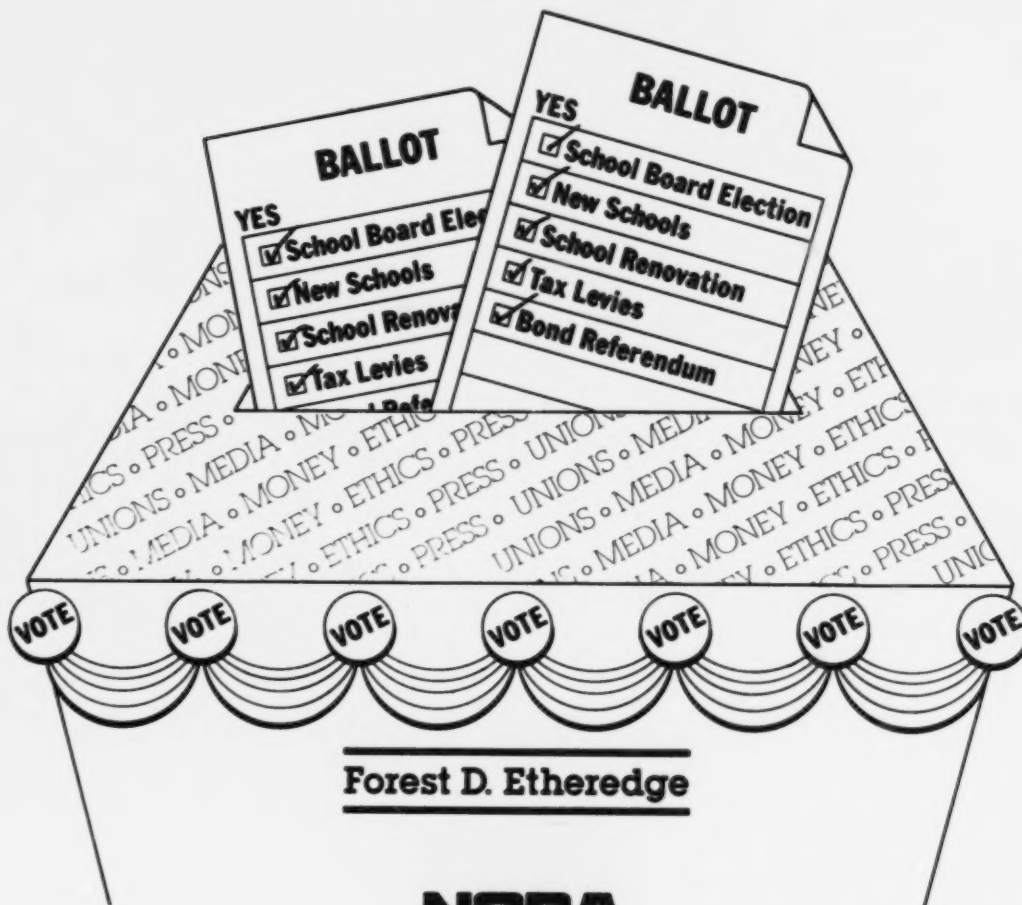
VOTE

Forest D. Etheredge

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School Boards and the Ballot Box

How To Win Elections
For Your Schools
And For Yourself



Forest D. Etheredge

NSBA
LEADERSHIP FOR PUBLIC EDUCATION

NATIONAL SCHOOL BOARDS ASSOCIATION

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FOREWORD

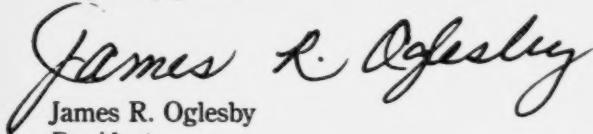
Public education and democracy walk hand in hand. School boards represent their local communities in providing educational leadership for the schools of America.

School boards, to varying degrees, must ask voters to renew their support for education, not only to fill vacant seats on the local board, but to authorize budgets, school construction, facilities renovation, and various and sundry programs. *School Boards and the Ballot Box* is intended to help school advocates effectively make their case to the voting public.

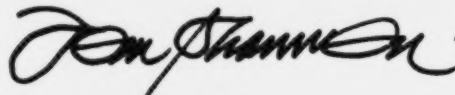
Author Forest Etheredge, a veteran educator and state legislator, focuses attention on all aspects of school elections ranging from the nuts and bolts of campaign organization and media relations to effective long-term strategies to sustain community support for school funding and board member leadership.

Public support for education exists, but school people must understand how to identify school voters and make sure their views are registered on election day. *School Boards and the Ballot Box* should help individual board members and citizens in general wage the type of election campaign that will advance the cause of education by delivering the votes and improving the communication process between citizens and their schools.

Very truly yours,



James R. Oglesby
President



Thomas A. Shannon
Executive Director

ACKNOWLEDGMENTS

I am indebted to Cathryn Ehrhardt for the significant contributions she has made to this book in her role as editor.

I also express appreciation to my wife, Joan, without whose support and encouragement this book never would have been written.

Forest D. Etheredge
February 16, 1989

PREFACE

This publication is based on one person's views. It does not represent nationwide experiences. Nevertheless, the principles of election campaigns presented in this publication are applicable to both personal campaigns for office and system-wide voter referenda—regardless of geographic location, size or type of community or level of campaign sophistication. For that reason, the National School Boards Association regards this publication as a valuable resource for all persons who are seeking election or appointment to a school board, continued school board service, or passage of a school referendum.

The National School Boards Association gratefully acknowledges the contributions of *Ann P. Kahn*, former member and chairman of the Fairfax County (VA) School Board, former president of the National P.T.A., and currently consultant to the National Academy of Sciences and *Jeannie M. (Sissy) Henry*, director of board development and consultant on school referenda campaigns for the South Carolina School Boards Association. Their comments on the manuscript provided valuable insights and perspectives that enhanced the final publication.

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INTRODUCTION

SCHOOL BOARDS AND THE BALLOT BOX

Campaigns are like faces; no two are exactly alike. Whether the campaign is for public support of a school financial request or for election or re-election to the board, however, several basic political principles can maximize the prospects for success on election day.

A drive to pass a school referendum or to win a seat on the board is a political campaign. It should be run like one. Effective strategies and procedures are essential for winning an election. An important thing to remember, though, is that no matter how effective a strategy is, its actual success depends on the size and character of the school community as well as on the circumstances leading to the campaign.

These pages contain many generalizations and there are, of course, exceptions to every rule. School systems and candidates vary. But the recommendations outlined in this book are adaptable to the features of a diverse school landscape. Be wary of saying, "That doesn't apply to my school system or school board race." The messages of this book will work if carried out faithfully and fine-tuned to local needs.

There is no *magic* formula to guarantee election success, no *easy* way exists to pass a referendum or to win a seat on the board. Even with the best strategies and election know-how, without good planning, organization, and hard work, many referenda and candidates will be rejected by the voters. Many school elections are lost because the available resources are not channelled in productive directions and because school people fail to bring their causes to the electorate.

Successful campaigning is grueling work for citizens, school staff, and board members. It demands long hours, great energy, good information, and a bouyant spirit. But the election process is more than a referendum or a board seat. What you as a board member, administrator, or citizen learn about your schools and community will serve you well in your job as an educational leader.

Some goals of board member campaigns and school referenda are similar. The outcomes of both elections depend on clearly communicating a few issues to the average voter; on identifying YES votes; and on making sure that supporters vote on election day. At this point the similarities end. In other ways, the differences between a referendum and a board campaign are as stark as night and day. Consider first a referendum.

A referendum asks voters to approve a school request: Shall bonds be authorized or taxes be increased? Visibility and publicity are seldom problems in a referendum campaign because the school system and its budget usully garner ample public concern. Therefore, the goal in such an election campaign is to identify and contact potential school



I think that most of us will agree that public education cannot survive without public support.

Robert Haderlein, speaking on "How to Use Good Politics in School Board Service," 1985 NSBA Convention, Anaheim, CA.

A campaign is not a thing or event. It is an ongoing process which requires the involvement of people. It is not easy, and it does take time.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.17.



There is a push by major U.S. cities to upgrade schools and furnish students with more specialized programs. But before officials can house new undertakings, they must overhaul continually deteriorating facilities, while suffering from pared staffs, limited capital funds, overcrowded classrooms, and deferred maintenance.

"Upgrading Past Due for Schools," Engineering-News Record, (Nov. 17, 1988), p. 64.

These [campaign] components don't fall together by chance. They are the products of a carefully planned political process, the results of the nitty gritty of campaign politics, of asking yourself every conceivable question and coming up with the answers to match, of understanding the dynamics of successful electioneering and applying them throughout the school district through the sweat and toil of a dedicated volunteer campaign team.

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1974), p.7.

supporters ("YES" votes). Little if any effort is given to the promotion of headlines in the local press. To conduct an aggressive public campaign (with notable exceptions described in Chapter 8 carries the risk of arousing opposition to the referendum. Ideally, school referenda are low-key campaigns.

Your answers to a number of key questions might suggest the appropriate type of campaign plan. These include:

- Have voters recently rejected any type of bond issue?
- Is organized opposition expected?
- What are the community demographics? (e.g., the ratio of parents to nonparents, age distributions, the percentage of senior citizens, major occupations, income and educational levels, and so forth.)
- Is the school referendum scheduled as part of a general election or as a special election?
- What is the financial situation of the local governing jurisdiction? When was the last increase in property taxes? What reasons were given to justify the tax hike?
- What other side issues could arise during the campaign that might exert a negative effect on school support?
- Which community and political groups are essential in order to obtain election victory?

Too many school people confuse the classroom and the political arenas. Generally, campaigners in losing referenda try to educate the electorate while working for its vote. These objectives must be handled separately in *distinct education and election phases*—not simultaneously. Although some overlap might occur, the emphases during the two phases must be identifiable and distinct. *Lay a foundation of information and need* during the education phase. Then, after the ballot and date are official, *launch the drive to identify and communicate with YES voters* during the election phase of the campaign.

School board elections are entirely different. Candidates (especially challengers or candidates in a race having no incumbent) struggle for visibility and for name recognition by trying to make the local news through whatever means they can.

The candidate's image in most cases depends on how and what the candidate decides to promote. During a school board campaign the spotlight shines on the image created by you, the candidate.

Questions relating to a candidacy for a seat on the board might include:

- Why are you running? What school issues are important to your campaign? What professional and personal experiences are relevant to developing a campaign image and theme?
- Who will be the opponents?
- Are the opponents well known by the local electorate?

- How many volunteers are you likely to recruit?
- How much campaign money will you be able to raise?

Candidates in a school board campaign must be politicians during the race and then educators after they cross the finish line—ahead of everyone else! Key to a winning school board race is knowing and remembering the limited interest that most voters have in public forums. Only a small minority of the electorate attends regular school board meetings, candidate nights, or budget hearings. Although a somewhat larger number reads the related press accounts, even this group constitutes far less than a majority of the voting public.

To be successful, you must effectively communicate a position on a small number of issues and simultaneously convey a favorable image to the far greater number of people whose votes you need to win an election. In other words, resist selling a comprehensive school reform package. Instead sell yourself! The personal element is all important in a school board election. Citizens will vote on the basis of a favorable impression and on whether your image and the needs of the school system represent a "good fit."

This book is divided into two parts on school board elections and school referenda. The first section offers an overview of board member election campaigns and effective *general* strategies and organizational methods. All the recommendations require relatively modest financing compared to other public elections.

The second part of this publication pertains to school referendum campaigns and tackles the subject of elections in greater detail. The sample campaign materials, job descriptions, and timelines are easily adaptable to a school system's needs. This section presents its basic political strategy in two sections titled *11 Lessons in Success* followed by *Steps to Success*. Then, two types of campaigns are outlined—the YES VOTE and the COMMUNITY CRUSADE, with subsequent chapters devoted to the media, campaign literature, finances, organization, speeches, and follow-up activities.



Our public schools are the last significant outpost of local control, ranking with the town meetings found in small New England communities. Citizens participate directly and indirectly in school governance; they vote on bond issues and in board elections; they speak out at board meetings; and they can run for the board with a limited budget and little red tape.

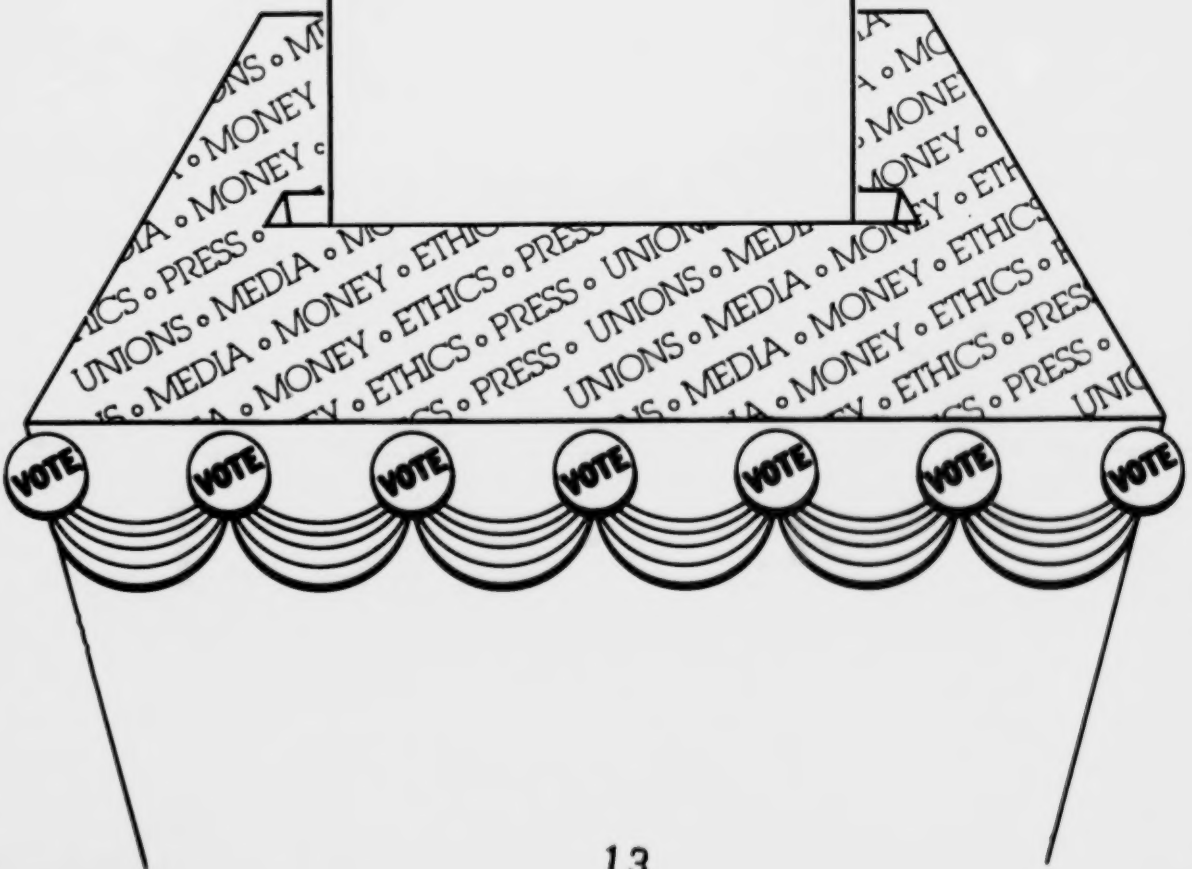
Nolan Estes, *Marshalling Community Leadership To Support the Public Schools*, (Bloomington, IN: Phi Delta Kappa, Fastback 35, 1974), p.15.

If we believe that—public service is politics—then we should acknowledge that school board members are politicians.

Robert Haderlein, speaking on "How To Use Good Politics in School Board Service," 1985 NSBA Convention, Anaheim, CA.

PART I

SCHOOL BOARD ELECTIONS

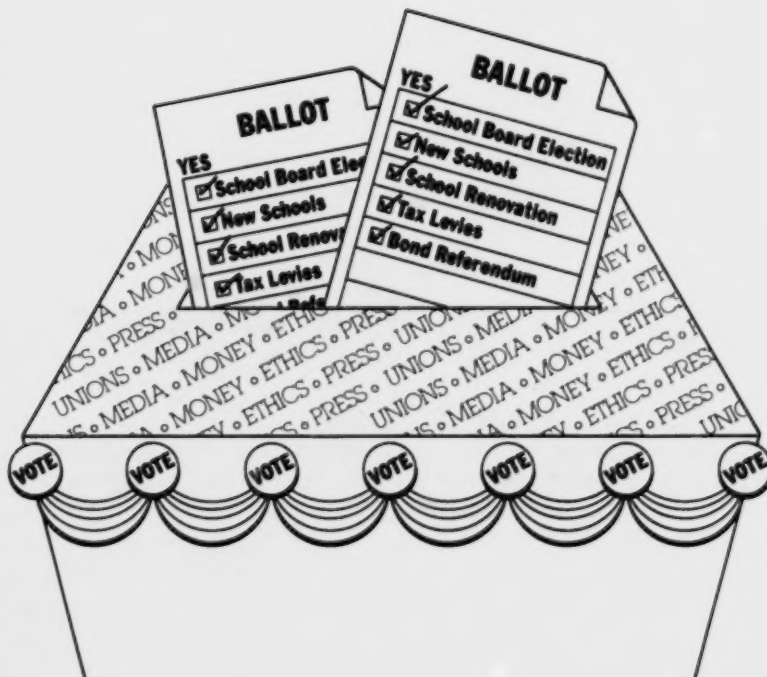


CHAPTER 1

THE CANDIDATE

INTRODUCTION

Board member elections vary widely across the country. It's important for you to become familiar with the community's campaign traditions. In some districts, candidates run highly organized, well-financed campaigns. Elsewhere custom dictates unsophisticated efforts with little or no organization or money. It's important to know local political style—and to honor it—because a “high-powered” campaign can backfire if citizens expect a low-key, inexpensive effort. Anticipate a negative public reaction if voters think you are trying to “buy” an election. As an alternative, consider conducting a well-researched, well-organized campaign on a modest budget and thus avoid running the risk of public backlash.



Ultimately, the performance of a board is measured at election or appointment time.

Hanford A. Salmon, speaking on “A Standard of Ethics for Boards and Superintendents,” 1985 NSBA Convention, Anaheim, CA.

Analyze your standing: Do you have competition (or anticipate any)? From what segment of the community does the opposition spring? Is this group compatible with or opposed to your general outlook on education?

Do an inventory of your strengths and weaknesses:

By what margin were you last elected?

What divisive issues have you voted on since the last election?

What fall-out has there been on those issues?

How many active supporters can you count on?

Henry Hendrickson, speaking on “How To Get Re-Elected to Your Board,” 1986 NSBA Convention, Las Vegas, NV.



Educating children is a universal, nonpartisan responsibility. You do not want to damage your board's ability to meet that charge by involving the schools in the partisan issues of "who is in" or "out" of power.

Robert Haderlein, speaking on "How To Use Good Politics in School Board Service, 1985 NSBA Convention, Anaheim, CA.

Are you a "Super Board Member?" Are you able to pull a full load at the office or in the household, plus an additional 20 to 30 hours each week as a board member, attend meetings, negotiate and attempt to satisfy the expectations of parents and teachers, as well as students? Do you spend even more hours speaking at public engagements or just being seen, because that's what board members often are expected to do? Do you have other civic and community obligations that also vie for your time?

Connie Long Estes, "The Super Board Member," *CABE Journal*, (Connecticut Assoc. of Boards of Education, Oct. 1988), p.4.

BOARD SERVICE: WHY ARE YOU RUNNING?

Candidates should expect to hear the question: "Why are you running for the board?" Before launching a campaign, prepare a concise and thoughtful answer. Indeed, *why are you running for the board?*

- Do you see board service as a way to advance your professional career?
- Do you aspire to hold a political office and see board service as a means to gain campaign and public service experience?
- Are you trying to achieve some particular school reform? Or are you concerned with preventing some proposed change in policy or curriculum?
- Do you want to make an overall contribution to local schools? Or are you promising sweeping changes in school operations?
- Is your interest focused on a single issue or constituency group? Typical single-issue candidates target textbooks, sex education, drug abuse, or curriculum. Special interest candidates often represent teachers, parents, or taxpayers.

These are some of the many reasons driving people to seek a seat on a school board. Some motives are more civic-minded; others more "political" in nature. Generally, voters favor candidates who express a concern for the community and who advocate improved education.

Whatever your motivation and response to the question "Why are you running?" make sure your reasons are consistent with your record (i.e., your past and present actions that are open to public scrutiny). Otherwise your campaign will be flawed from the start. For example, your interest in the school board might stem out of a desire to serve the community. However, if you've never helped with community service activities (paper drives, voter registration, community beautification projects), your sudden interest in a board seat might be cause for suspect. Is this simply a stepping stone to higher political office? Or are you genuinely motivated to serve the educational interests of your community?

PUBLIC, PERSONAL, AND FAMILY DIMENSIONS

Public Life

Board members shoulder tremendous responsibilities. Working together as a board, members primarily set policy for local schools. Other board duties include such things as maintaining an on-going working relationship with the superintendent; setting educational goals; resource allocation; employee negotiations ("negotiations" exist even in non-bargaining states); resolutions of disputes concerning pupil and staff misconduct; and communication of school needs to the public. Still other board activities include:

- Establishing procedures for the operation of the board.

- Electing board officers.
- Hiring board staff assistants.
- Determining who will be on the district negotiating team (if there is one) and employing a chief negotiator for collective bargaining.
- Approving school attendance zones.
- Retaining an attorney or law firm for the school district.
- Setting strategy and coordinating litigation decisions when the school system is involved in a lawsuit.
- Periodically reviewing and evaluating board operations and performance.
- Working with (as well as authorizing the administration to work with) city, county, and other government and non-government officials and agencies.
- Hiring and evaluating a superintendent.
- Prioritizing school goals and budgeting school monies.

[See *Becoming a Better Board Member*, (National School Boards Association, 1982), p. 8 for additional information.]

School board policies affect both the day-to-day education of school children and the career opportunities available to students after graduation. The local community and the nation, too, reap the harvest of the quality of education and standards of social conduct transmitted to children in public schools. In many ways, a school board member's job is one of the most important in American society.

The satisfactions of public service can be substantial. It is rewarding to be part of an effective board responsible for local education. School board members share a mission to serve local needs and contribute to a better tomorrow.

However, board service can be frustrating when members work at cross-purposes or when the educational program is not meeting the needs of the students. Despite strong board leadership and a working consensus on school improvement issues, unless the board functions as a team the effectiveness of board service is diminished.

Remember that even the best of school boards have problems. The decisions they face are often complex and controversial. Emotions run high throughout a community whenever attendance boundaries must be realigned, bus schedules changed, or hazardous materials such as asbestos are detected in school facilities.

Nevertheless, school board service provides an opportunity for a person to "make a difference" by helping to mold (through policy development) a quality school program that benefits the community's children.



School boards expect a high level of performance from those who are employed to run the schools. Communities also expect a high level of performance from those who are elected or appointed to govern the schools.

Hanford A. Salmon, speaking on "A Standard of Ethics for Boards and Superintendents," 1985 NSBA Convention, Anaheim, CA.

Local school board members have been mandated the responsibility of the education of children in our district. This mandate is no less important than that of any elected official. If in doubt, ask the parent of any child or the school board attorney.

Shelby Shore, "Boardsmanship and Politics," *Voice*, (North Carolina School Boards Assoc., June 1988), p.31.



The cost of school board membership includes time spent on school board meetings and other duties, loss of friends and business clients due to community conflict, and criticism from the public.

Roger D. Rada, "A Public Choice Theory of School Board Member Behavior," *Evaluation and Policy Analysis*, (Fall 1988), pp.229-30.

School board members should expect criticism, both constructive and otherwise. It goes with the territory. It is good politics to avoid hostile responses to criticism. It is only natural to want to answer "fire" with "fire," but we need to condition ourselves from doing so. It makes good political sense to avoid generating more intense conflict between the constituency and the board.

Robert Haderlein, speaking on "How To Use Good Politics in School Board Service," 1985 NSBA Convention, Anaheim, CA.

Personal and Family Life

Board service impacts many areas of the board member's personal and family life. It takes a strong person to handle these commitments. Expect to have your motives and even your intelligence questioned during periods of controversy; to be grilled at social events; and to be quoted and misquoted in print.

Candidates should consider the impact of board service on their families. Spouses and children might suffer more than board members during the difficult times of heavy criticism.

Consider board service a family affair. Make the entire family a part of your team. During the campaign expect questions from the press about family interests, work experiences, and schools. And after the successful election, family members need to accept your absence on meeting nights.

ETHICS

Personal Ethics

Most states have laws prohibiting board members from using public service as a means of benefiting their own or a family member's business interests. Thoroughly review the property holdings and occupations of your relatives. In some cases a board member might benefit indirectly from an official action. For example, your sister might own and operate a commercial company that is competing for a school board contract. Or perhaps your father is president of one of the local banks where the school board has an account. Depending on state laws and other circumstances, service on a school board might be impossible or ill-advised unless a relative is willing to sever his or her employment or business interests or unless you abstain from voting on those matters that could benefit such individuals.

In a more positive vein, candidates should begin with commitment and see the commitment through with the work ethic. In practical terms, a board member should:

- understand parliamentary procedure;
- know how to get and present facts, not just interpretations of them;
- budget enough time for thorough preparation and communication with citizens and school employees;
- consider alternative solutions to problems;
- maintain the confidentiality of executive session discussions;
- work with other board members effectively;
- take the responsibility of policy development and adoption seriously;
- select sound curriculum and instructional materials;
- provide fair and equitable working and learning conditions for school pupils and employees;

- strive to realize the goal that "All children can learn."

[For additional information, see *Becoming a Better Board Member*, pp. 8-9.]

Political Ethics

Every board member needs the freedom to vote impartially for the long-range best interests of the entire community. Board members must not allow themselves to be the pawns of any group, no matter what amounts of time or money the group contributed to your election success. As a board member you represent the entire community. The best campaign advice is to listen to all special and individual viewpoints. Assure all groups that you will listen to their views, but do not promise to deliver a vote on any issue. If that means doing with less campaign funds or fewer volunteers, it is well worth the trade off.

Two examples highlight these ethical concerns. Candidates in school board elections might openly (or more discreetly) represent a single issue or group in the community. The issue could be controversial textbooks, sex education, attendance boundaries, or alcohol and drug abuse in schools.

If elected, the board member concentrates his or her own attention (as well as the board's) on achieving the policy or curriculum objective. School board service becomes a crusade. The single-issue board member often fails to acknowledge that individual board members have no independent authority. Remember, the power of a school board rests in its collective voice. By demanding that one issue or position take priority, the board member in effect says to the board: "Our collective decision is not what counts unless it happens to agree with my own view."

Another adverse effect is the diversion of the board's attention away from other responsibilities. If a majority of board members does not concur, the single-issue board member tries (often in whatever way possible) to mobilize support for the position.

The media, if given the chance, will emphasize these types of conflicts in press coverage. Such stories might present an unbalanced view of the controversy and antagonize members of the community, another factor that aggravates an already difficult situation.

School board members have the right and responsibility to bring their own (and their constituents') policy and curriculum concerns to the attention of the entire board. But, individual board members should consider themselves as contributors to school policy development, not as promoters of specific views.

If you expect to campaign on a single issue, take as moderate an approach as possible. Be committed, but don't promise a new policy, a change in boundaries, a new school, or the elimination of a program or curriculum just because you are elected to the board.

No matter what your reasons for running for a seat on the school board or what positions on issues you take, candidates should abide



It's good politics to avoid hostile responses to criticism. It's only natural to want to answer "fire" with "fire," but we need to condition ourselves from doing so.

Robert Haderlein, speaking on "How To Use Good Politics in School Board Service," 1985 NSBA Convention, Anaheim, CA.

School boards should function in a non-partisan, broadly representative, team-spirited manner. Every member of a school board should represent open-mindedly the entire school district, and in consequence, must let his or her consideration for the entire district take precedence over every form of partisanship and special interest—political, racial, religious, geographic, economic, social, civic, or other.

Warren G. Reeder, *Fundamentals of Public School Administration*, Fourth Edition (NY: Macmillan Co., 1958), p.65.



Credibility: Communication starts with a climate of belief built through performance on the part of the communicator.

William Thurman, speaking on "Tell It Like It Is," 1987 NSBA Convention, San Francisco, CA.

Administrators face an ever-growing number of people who are trying to determine education policy and the values of the system by forming pressure groups.

"Educators Need Clear Ethical Positions," *Education Leader*, (Nov. 11, 1988), p.11.

by one golden rule of politics: Don't promise what you can't deliver. The next election comes around sooner than you think. Few things frustrate and alienate supporters more than unfulfilled promises. Strive to be a credible and realistic candidate.

Your effectiveness as a board member will depend on the working relationships you establish with fellow board members and the superintendent. Single-issue candidates can be productive school board members if they follow these guidelines:

- Limit yourself to one or two concerns. Don't raise these issues at the first board meeting. Allow for open discussion among board members. Be careful that your "issues" don't touch on personnel or other sensitive matters that are properly the subject of executive sessions.
- Try to be as objective as possible. Don't urge board members to approve a policy that doesn't serve the interests of the entire school system. Ask the superintendent to research your "issues" and present his or her recommendations before bringing the matter to the board's formal attention. Acknowledge and defend the integrity of the school board deliberation and policy process.

[See *Becoming a Better Board Member*, pp. 20-21.]

A second concern is the possible influence of employee unions, (frequently teacher unions) on individual school board members. Promising campaign funds, votes, and other resources in return for pledges of support on matters of interest to their employees, teacher unions potentially can compromise a school board member's integrity.

In recent years, teacher unions have exerted strong pressure in school board campaigns. It has become common for unions to recruit and run candidates to represent employee interests on the board. In some policy areas the interests of teachers and the interests of the community could overlap; in other words, a board member at times could support without conflict union demands and the community's best interest. Teacher unions, however, tend to focus narrowly on the economic concerns of members and might pose a definite conflict of interest for the school board member.

Whether or not state law prohibits "negotiated" contracts, teacher unions exert some degree of influence in all of the 50 states. The school board represents the local community in setting policies on salaries, fringe benefits, and working conditions (e.g., length of school day and school year). A board member should be sympathetic to the needs and wants of school employees, but these interests must be meshed with those of other school and community groups. Good communication with local union leaders is essential. But never let the dialog involve privileged information or tips on expected board action or recommendations from the superintendent.

If a group attaches a set of conditions to an offer of time, money, materials, or votes, say no. Instead, wage as broad a based campaign as possible. If you accept help from the "Angry Taxpayers" or the teacher union, make it clear that you welcome contributions from all

community groups and that your vote on individual matters cannot be traded for campaign support.

A CANDIDATE'S IMAGE AND CAMPAIGN THEME

After deciding to throw your hat in the campaign ring, select a theme to identify yourself and your campaign. You already have answered the question, "Why am I running?" Now use the response as the basis on which to develop a campaign theme. Remember, your image is critical during an election; it could be the deciding factor for much of the voting public.

Personalize your image. Try to make it as child-oriented as possible (i.e., reflecting the welfare of children). For example, if you are running to improve the school system, you might identify CHANGE — FOR THE CHILDREN'S SAKE. A candidate promoting a curriculum issue could adopt a GIVE OUR CHILDREN THE BEST slogan.

Make the campaign theme consistent with your personality, working style, personal and professional accomplishments, and campaign goals. Base a winning campaign on your thoughtful and honest answer to the question "Why am I running?" Evaluate all possible campaign themes by asking: How effectively does the phrase communicate my message? Remember, the key word is "consistency." Without it your campaign as well as your integrity are on the hotseat.

Judge potential campaign themes and images not only by their grassroots (average citizen) appeal but also by their attractiveness to community leaders and groups whose support is crucial to your victory. Get to know these leaders. Ask for their suggestions and reactions to your ideas. Before you know it, you'll have some new-found supporters!



Winners know they are on stage all the time and they understand that the image is the reality...that what people think is critically important.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.17.

CHAPTER 2 THE CAMPAIGN

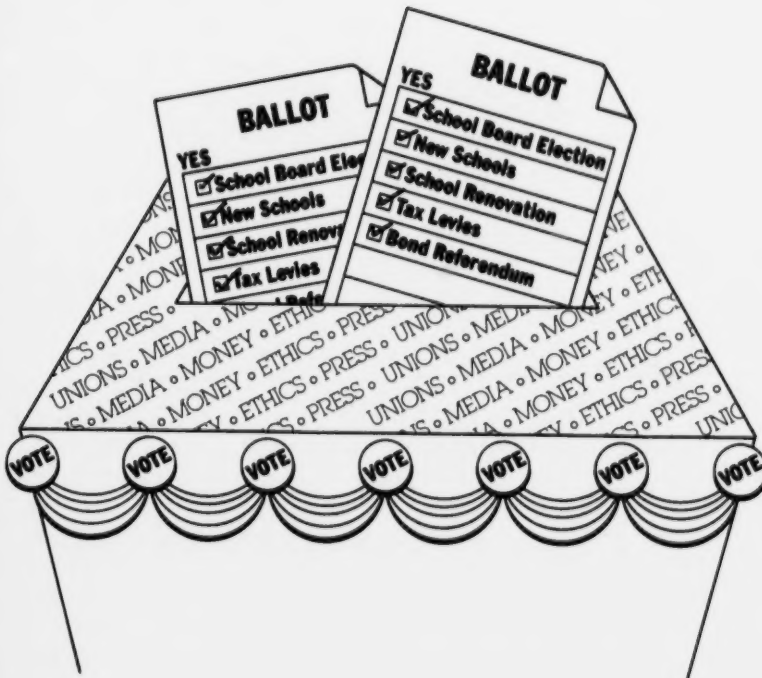
INTRODUCTION

Even with an outstanding candidate, a winning campaign cannot succeed without a plan based on research. Assemble the best available information on the electorate and past school board elections. Then analyze the data according to:

Who seems likely to vote for me?

How can I recruit additional voters?

Although the evaluation is subjective, still it's important to make the assessment as realistic as possible. If you lack political experience, enlist the aid of someone who has survived the campaign trail. In fact, your campaign manager ideally should be such a person.



School board elections may be a year away, but... now is almost too late to initiate steps that will help insure your victory at the polls and improve the communications in your school district.

The tips include advice to behave yourself at board meetings... Research indicates the public does not like school board members who grandstand or dicker [and] becomes frustrated with a board it perceives as disorganized or ill-informed... Be a booster of open and honest public information and community relations programs in your district, recognizing that the money you spend will have a direct, positive impact on the overall success of the district.

"Service Offers Advice on Getting Re-Elected," *Signal*, (Washington State School Directors Assoc., October 1988), p.6.



A radical change in the distribution of voters, then, gives an advantage to challengers. Without previous public commitments, challengers can adjust their policies in order to capture enough of the combination of newly franchised voters and established voters to win the election.

Roger D. Rada, "A Public Choice Theory of School Board Member Behavior," *Evaluation and Policy Analysis*, (Fall 1988), pp.225-26.

STUDY PAST CAMPAIGNS

Visit the local election commission or government agency responsible for maintaining voting records. Obtain copies of the election results—precinct by precinct and candidate by candidate—for the past several elections. Then identify the significant issues in each election by examining copies of newspapers (most local libraries have them). If possible, talk to previous candidates who might share their insights and resources.

Review past election results to determine the *geographic areas of high voter turnout*.

- Was participation always high in these precincts or did the extensive turnout correlate with certain school campaign issues or campaign strategies?
- What events have occurred since the last election that either strengthen or weaken the positions of other candidates in this election?

Now, study the *demographic characteristics of the district*. Collect as much information as possible on the ages, incomes, and educational levels of voters in each precinct. Consult Census Bureau publications at your library or at the local Chamber of Commerce to obtain this information. Then review the election data in order to identify areas of potential support in your district. You might find that 80 percent of the votes cast in the last school board election were located in only 20 percent of the precincts. Or you might learn that such a vote distribution occurred only once in the past three elections. Ask yourself whether voters in high-turnout areas are likely to support your election bid. If the answer is negative, consider ways to appeal to these voters.

Your campaign goal is to receive enough votes to win on election day! It is a mistake to build a campaign plan on the expectation that people who have never voted in a previous school election suddenly will come out and vote just because you happen to be a candidate. You, no less than your predecessors, must gird yourself to do battle with the age-old enemy of candidates: *public apathy*.

Your campaign plan should outline methods to obtain the support of the majority of traditional school election voters. Research data will help you identify the groups and the geographic areas most likely to support your campaign. Based on this information, outline the winning strategies for communicating your name and campaign theme to the "target" groups in each of the geographic areas.

ATTEND SCHOOL BOARD MEETINGS

It's unthinkable that a candidate for a school board seat would not have attended local school board meetings in the past. If that's your case, however, then by all means attend several meetings of the current board before deciding to seek office. Only through personal observations can you:

- develop sound knowledge and understandings of the current issues facing the board.
- establish credibility as a candidate by demonstrating a high level of interest in school issues.
- obtain first-hand knowledge of individual board members' views, strategies, and followings.

Moreover, witnessing a board's deliberations can serve as a sobering experience to the uninitiated. School board meetings are anything but glamorous and exciting, as a rule. Board members must have a great pool of patience and tolerance in order to endure the seemingly endless discussions that characterize many meetings of any deliberative body. This is the perfect time to ask yourself, "Do I really want to be a school board member?" If your instincts tell you that you can work with others such as the persons presently sitting on the board, that you have educational (not political, *per se*) interests at heart, and that you have the personal constitution to prepare for and participate in scores of public meetings over the length of the term of office, then by all means move ahead with your campaign plans.

VISIT NEIGHBORHOODS, TALK WITH CITIZENS

Regardless of how familiar you are with the nooks and crannies of your district, it's imperative for you to visit each school and its neighborhoods. Seek out opportunities to converse with citizens about local schools. Do more listening than talking. The information and ideas obtained will be invaluable during the campaign.

DEVELOP A CAMPAIGN PLAN

Three resources are required for a campaign—sufficient lead time for planning; sufficient money to cover campaign costs; and sufficient numbers of people to carry the campaign forward. The campaign plan describes how to use these resources effectively to win votes.

Remember to have your top-level committee members and core groups of supporters help you flush out the campaign plan. These individuals will be instrumental to carrying out campaign activities and strategies: they must feel ownership of the plan.

- *Draw up a list of factors that could affect your campaign.*

Evaluate each campaign factor in terms of its potential impact. Make sure your plan takes each factor into consideration.

- *Identify the likely campaign issues*, your own and your opponents' positions, and any other views that you anticipate being expressed during the campaign.
- *Target your likely supporters*, forecast voter turnout, and estimate the number of votes needed to win.

This information coupled with your election image and theme should lay the foundation for the campaign plan.

- *Review your image or theme.*

Will your image or theme effectively communicate your message to the voting public? After listening to voters and scrutinizing the current school issues, review the choice. Settle on a message that now seems most likely to strike a responsive chord with voters and at the same time builds on your strengths and interests. Both the mission and the messenger must blend together evenly in order to project a believable image.

- *Prepare written guidelines.*

Campaign workers need easy access to the campaign guidelines. If the document is wordy or confusing, it is no plan at all because supporters won't be able to follow through with implementation. Don't begin each campaign day by asking, "What should we do today?" Many campaign activities require several days or weeks of lead time. A succinct, well developed campaign plan is the only way to navigate your way to election victory.

Campaign guidelines should include:

- A description of the basic campaign strategy (theme, issues, and targeted groups of supporters).
- A description of tactics to implement the campaign objectives, including the allocation of campaign resources.
- A list of scheduled campaign activities. (When will each activity occur? Who is responsible for the activity? How much money is available for the activity?)

Review the campaign plan for clarity:

- Are the campaign activities self-initiated or do they depend on the actions of others?
- Are the plans realistic?
- Does the plan use the available resources in the most efficient manner?

If any of these concerns require further development, devote the time and energy necessary for improvement *before* proceeding to the next stage of the campaign. This is time consuming, to be sure. And an eager and ambitious candidate could well be tempted to launch the campaign before nailing down the game plan. This, however, has proven to be the deathnail of many a candidate. To avoid a similar fate, it's essential to prepare a thorough and viable plan. Practically everything else in your campaign will be driven by this effort.

COMMUNICATE

If you expect to win public support, you must communicate who you are and what you have to say about the central campaign issues. In practical terms, the task at hand is to expand your *name recognition*. Although your reform agenda may comprise 12 initiatives, it's a grave mistake to publicize the entire program during the campaign.

Keep in mind the campaign objective to link your name with an identifying slogan (e.g., "EDUCATIONAL EXCELLENCE") and display this and your name prominently in all of your campaign literature (Jane Doe: A Voice for EDUCATIONAL EXCELLENCE). Persistently repeat this message.

Incorporate three of your ideas for school improvement in your speeches, group discussions, and promotional literature. Select the ideas having the best chance of broad community support. There is no need and probably no opportunity to elaborate on your ideas during the campaign—that can wait until after the election. Nevertheless, make sure your thoughts are well developed even if only in your own mind. Do not put yourself in the position of finding out—usually in a public forum or the news media—that your ideas have consequences you had not considered.

When campaigning remember that voters have short attention spans; candidates need to interest citizens in school issues, not bore them with details. Although you will have an occasional opportunity to discuss your ideas in depth (perhaps with newspaper editors), mostly you will be in situations where the audience prefers to hear all of your views *in 25 words or less*. The successful candidate must speak in shorthand. It might not be easy, but it is possible. The keys to success are perseverance and work; so practice ways to convey a brief message using forceful words that stir people.

Practice your public communication skills—over and over again—before you ever get to a speaker's platform. Learn about eye contact, body language, forceful and succinct speech patterns, and how to react in a friendly manner in the face of hecklers.

CAMPAIGN FINANCE

The local costs of school board elections vary widely throughout the United States. Some campaigns are conducted without spending a single penny while others involve the spending of tens of thousands of dollars. The great majority, however, are low-budget campaigns.

It's important to know and to follow the tradition in your community regarding spending. If you begin spending large sums of money in a community having a low-key, low-budget style, voters will perceive you as foolish or, worse yet, as having some ulterior motive in running for office. Such action opens the door to being fairly or unfairly portrayed as the mouthpiece of a special interest group such as a teacher union. Candidates perceived as trying to buy an election seldom receive a vote of public confidence. In any event, school board elections rely far more on volunteer help than on money.

The question remains, "How should I raise the money I need?" If you estimate \$2,000 of campaign expenses, then proceed with fundraising by asking 100 of your friends to contribute \$20 a piece. Or, if you can afford to do so, just pay the costs yourself—out of your own pocket. The important concern is to make sure your campaign does not finan-



When considering costs of school board membership we need also consider the cost of candidacy. These might be monetary costs for such things as newspaper ads, mailings, and filing fees; time spent filing and campaigning can also be costly; and losing an election might include the cost of humiliation.

Roger D. Rada, "A Public Choice Theory of School Board Member Behavior," *Evaluation and Policy Analysis*, (Fall 1988), pp.230.

cially depend on a single source outside the family. Don't obligate yourself and compromise your future independence by permitting an individual or organization to lay claim to your vote or influence by way of the campaign coffers.

If you are going to raise more than a few dollars, organize a finance committee. The committee chairman should be someone well-known in the community not only because of the local contacts he or she already has but because of the integrity this person presumably brings to the activity.

Next on the agenda: the candidate and chairman should collaborate on selecting individuals to fill the other committee slots. The size of the committee will depend, in part, on the projected fundraising methods. Each committee member should be assigned a fundraising goal, perhaps \$100, \$500, or \$1,000—the exact amount depending on the specific campaign needs. Of course, the goals should exceed the campaign budget because some committee members might not raise the targeted amount.

The most effective fundraising techniques are the familiar ones. Person-to-person requests always are preferred to telephone or direct mail solicitations. Few friends and neighbors will refuse a personal request for a modest donation. Committee members should review directories and club membership lists for potential contributors.

Telephone requests are the next best fundraising method. Most people will contribute to a worthy cause if asked by a friend or acquaintance. A mail request is less successful because it's too easy to ignore. However, mail solicitations can be used as "ice breakers." If the potential contributor doesn't respond, follow up with a telephone call. This obviously requires an accurate system of recordkeeping.

An event such as a reception, picnic, or dinner at a local hotel or restaurant are common fundraising techniques. Consider two potential problems with hosting these activities. First, the events frequently require significant amounts of staff time as well as a long lead time for planning and implementation. Second, a good portion of the total receipts are earmarked to pay the costs of the activity. For all the effort and time spent, the campaign might not realize a sufficient revenue-over-costs intake.

CAMPAIGN STAFF

The ability to recruit and retain a team of enthusiastic volunteers is the key to any campaign's success. Despite the long and arduous work involved, a well organized campaign will produce a great sense of accomplishment—the same sense that a football team experiences after a well-executed play. Why? Because a campaign is a team effort. And teams like to succeed.

Presented below is a description of the major leadership positions in a school board campaign.

Campaign Manager

Much of your election success hinges upon the person you select as your captain: the campaign manager. This person is responsible for directing all facets of the campaign. The manager supervises each staff member and reports directly to the candidate on the day-to-day operations.

The most important qualification of a manager is the ability to (as the title suggests) *manage*. This involves the ability to organize, to delegate, to track assignments and timetables, to keep overall expenditures within budget, and to motivate the campaign staff. Prior campaign experience certainly is desirable, if not mandatory.

A word of caution: never try to manage your own campaign. It's foolish to try. After all, being a candidate is a full-time job within itself. Coffees, neighborhood canvassing, and evening events will not leave ample time for campaign management.

The manager's job ideally is a full-time position although this might be unrealistic because of the person's employment responsibilities. Make sure your manager has enough time to devote to the campaign. The myriad of campaign details consumes a great deal of time and requires on-the-spot attention for weeks or months on end.

The other major task of both the candidate and the manager is to say "thanks"—continually. Remember and acknowledge at every opportunity the contribution of your volunteers and the support of individual citizens and organizations.

Finance Chairman

The finance chairman should have extensive community contacts to tap for financial contributions. This person might supervise a small number of assistants in a relatively modest campaign, or a number of "captains" who in turn are served by several "lieutenants" in a campaign that requires the collection of large sums of money.

Treasurer

Most states require some sort of financial reporting for election campaigns. This generally translates into the office of campaign treasurer who has the responsibility for maintaining the financial records and receipts. Ideally, the treasurer should possess expertise in accounting and bookkeeping. If such a person is unavailable, then select someone who is a meticulous recordkeeper, dependable, and able to learn the state legal requirements.

Failure to comply with state codes could have a devastating effect on your campaign. Members of the press (and other candidates) usually check on candidate compliance so it is vitally important that your treasurer adheres to all legal requirements relating to elections.

Coordinator

Working closely with the campaign manager and the candidate, the coordinator implements the specific campaign activities. Duties include



Assign key campaign tasks to "high speed people"—people who have a track record for getting the job done. Start by putting the campaign in the hands of one person. Give that person the authority and the responsibility for the entire campaign. Make it clear that the goal is results, and free up your campaign coordinator so he or she can be dedicated to this priority effort.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.

scheduling and recording the candidate's itinerary on a daily calendar. The calendar should be formatted on an hour-to-hour basis. Candidates' nights, PTA meetings, and school board meetings should be noted, along with all speaking engagements or appearances. The coordinator also assumes responsibility for the candidate's speaking or appearance schedule.

Publicity Chairman

The publicity chairman should:

- Prepare and distribute news releases.
- Prepare media kits for distribution to the press. Kits should contain background information on both the candidate and the campaign issues.
- Arrange for the candidate to meet with editors and reporters at local newspaper offices and radio and television stations.
- Organize a "letters to the editor campaign" as a way of increasing the candidate's visibility.

Ideally, the publicity chairman brings journalism or broadcast media experience to the campaign. The person filling this position should be aggressive in the sense of having a dogged determination to pursue opportunities for media exposure and favorable press coverage.

Volunteers

Successful campaigns tap substantial numbers of volunteers. Their precise duties depend on the tasks outlined in the campaign plan. Volunteers usually compile mailing and telephone lists, canvass door-to-door, make telephone calls, and fulfill a variety of other duties.

If possible, make one person responsible for volunteer recruitment, training, and supervision. The campaign manager's job is much easier if the person can say to the volunteer coordinator, "Next Friday morning I need ten workers at campaign headquarters to send out a direct mailing" and know that volunteers will be there to work at the scheduled time.

Volunteer recruitment can be a full-time job. Even though successful coordinators have a people-oriented disposition, they find their jobs much easier if the candidate provides a long list of personal contacts who, when asked, will help out in the campaign. The coordinator also can look to the ranks of his or her own (and other volunteers') family and friends, fellow club members, neighbors, and persons attending the candidate "coffees."

CAMPAIGN ORGANIZATION: HOW TO PROCEED

• Plan

If the first element of a winning campaign is the *plan*, the second is the *organization*. Early in the election process assemble a group of people who are committed to your candidacy. Election research

is one of the first duties to assign to your campaign workers. When this has been completed, the information should be organized to provide a solid foundation for developing the campaign plan.

- **Select a Campaign Manager and Complete the Paperwork**

As soon as possible, name the campaign manager. From the start, either the candidate or the manager should stay current with the state laws governing school board elections and campaign finance. You can't afford to embarrass yourself by failing to file the petitions necessary for your name to appear on the ballot—or to forget any of a host of other things specified by law!

- **Find a Headquarters**

Select a campaign headquarters site. This place could be located in a vacant store that is rented or donated to your campaign or in any other available space (including your campaign manager's basement or garage if necessary). In any event, you'll need a central location where Volunteers can meet and where campaign literature and supplies can be stored.

- **Recruit volunteers**

After the key members of the campaign staff are selected and the plan is written, then volunteer recruitment begins. During this period the candidate should attend a number of coffees (similar to those described in Part II, Chapter 7) to encourage volunteer recruitment. Plan on scheduling as many as five coffees in one day with a goal of enlisting a total of 15 to 20 firm commitments from guests to serve as volunteers.

- **Identify YES voters**

The most limited resource in any campaign is the candidate's time, so make certain that each hour is spent productively. The candidate should concentrate as much as possible on targeted groups of supporters. Schedule as many meetings as possible. The candidate's schedule should reflect the list of geographic areas and voter groups prioritized according to their respective number of potential supporters.

The candidate should spend most of his or her time in meetings with voters and in door-to-door canvassing of the targeted precincts. Emphasize the canvassing activity because it promotes both name and campaign theme recognition.

COMMUNICATE YOUR MESSAGE

Campaign Theme

A well run campaign sharply focuses the content of the candidate's message on the interests of the audience. Each time you speak to a group, plan to elaborate—briefly—on two or three issues. Keep the posi-



The concern to "keep the schools out of politics," which has led to separate elections for school boards, exacts its price in low participation.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.53.



If, however, a school district acquires a new group of voters, the distribution of voters could change dramatically.

Roger D. Rada, "A Public Choice Theory of School Board Member Behavior," *Educational Evaluation and Policy Analysis*, (Fall 1988), p.233.

tion papers you have written on other school issues in the filing cabinet during the campaign. There will be plenty of time to publicize the details afterwards! You will hurt your chances of victory if you fail to focus your effort on communicating a short and simple message to the voting public.

Brochures

Printed messages always help reinforce your political message. Every campaign should have some printed material for distribution, even if the candidate is running on a shoestring budget. Prominently display your name and theme on all campaign literature. A photograph of yourself is advisable because it personalizes your message. Also consider using a family or some other more natural type of photograph instead of the traditional studio picture.

If you have more than one kind of printed material, use the same color combinations throughout. Voters should be able to identify your literature by color even before they read your name. Consistency in color and type styles is important so thoroughly consider the choice before printing your first promotional piece.

If your campaign can afford only a single piece of campaign literature, then make it a brochure. An 8½ by 11 inch piece of paper with two folds serves most campaign purposes. Make your name and campaign theme the most (if not the only) message on the brochure's front panel. Inside panels should contain several pictures (yourself, school buildings, or other appropriate subjects).

Make the brochure's text brief. Effective brochures describe the candidate's positions on issues clearly and simply. Don't fill up brochure space with detail. The best brochures leave plenty of white space. This design encourages voters to read the entire brochure. (See *Exhibit A* for a sample brochure.)

Distribute the material during door-to-door canvassing, at coffees, and at candidates nights. Plan to leave a brochure in the hands of everyone you meet as a reminder of your name and theme.

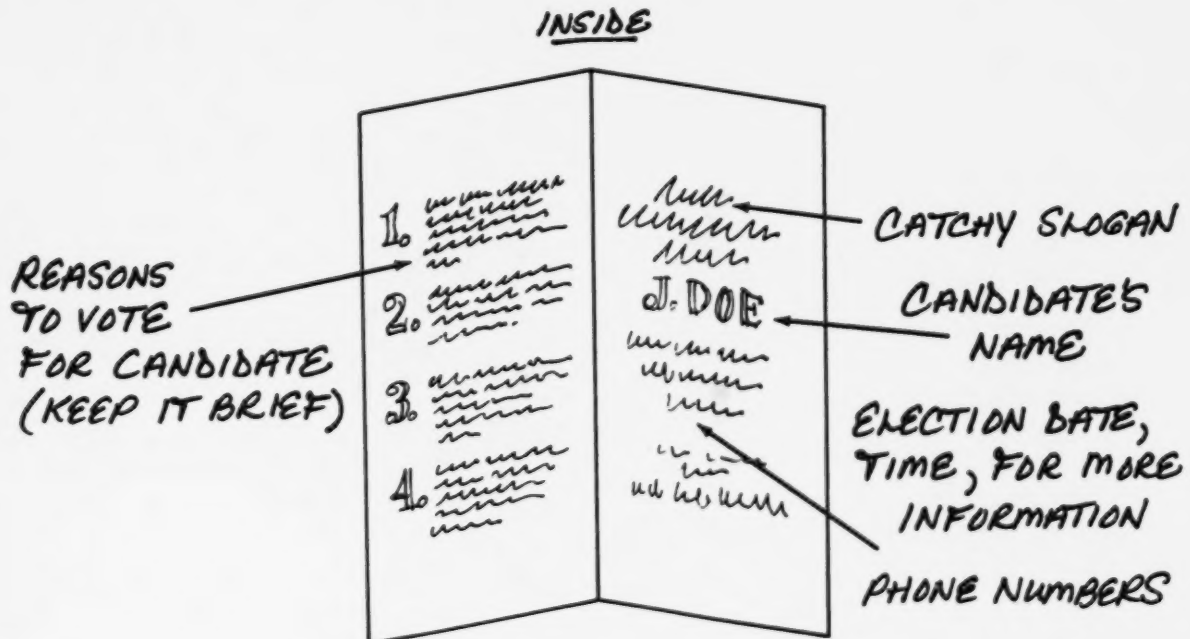
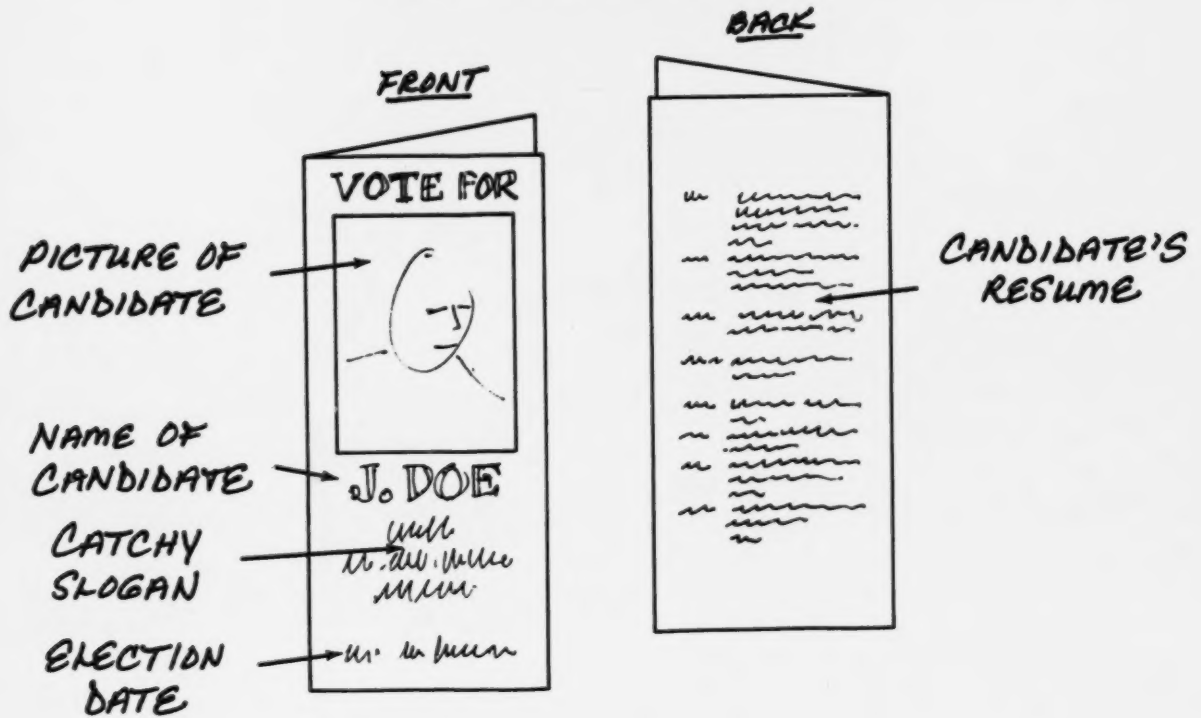
Friend-to-Friend Cards

Friend-to-friend cards are an effective and relatively inexpensive campaign technique. The postcards should prominently display the candidate's name and theme on the message side with the remaining space used for a brief note. Volunteers should add handwritten messages, address the postcards to their friends, and return the cards to campaign headquarters. The cards should be mailed to ensure delivery a day or two before election day.

Yard Signs

If the budget allows, then invest in yard signs. Purchasing water and weather resistant signs is usually worth the extra cost. Campaign signs

EXHIBIT A
SAMPLE CANDIDATE BROCHURE



display your name, office sought, and campaign theme (if space permits). Your name is the most important part of the sign because of the campaign goal to increase name recognition. Make a team of volunteers responsible for finding sign locations in the targeted neighborhoods. This can be rather time-consuming, so assign the responsibility early in the campaign. Two to three weeks before the election, a second team of volunteers should put up the signs. For the most impact, erect the signs on the same day.

Bumper Stickers

Spend any remaining funds on bumper stickers as a secondary means to expand name recognition. The decals should be of high enough quality to ensure easy removal after the election; otherwise, many people will refuse to display bumper stickers on their cars. For maximum effect, ask that the stickers be mounted on the bottom of the rear window (if such isn't prohibited by state laws or regulations).

Again, keep the message simple and the type large so the words can be read easily by the occupants of moving cars.

Direct Mail

Direct mail is a feature of many school board campaigns especially during the early stages. However, mailings are expensive and the response rate is low compared to equivalent amounts of time spent on telephone or door-to-door canvassing. The size of your budget will determine the extent of your direct mail campaign.

Direct mail efforts should be targeted to groups of projected school supporters or undecided voters. During the planning stages of your campaign, investigate what mailing lists are available (ideally containing the names of only registered voters) and whether the lists can be sorted according to your targeted groups. An early mailing to a group of supporters announcing your candidacy and asking for money and volunteers might, indeed, be a productive tactic. But don't rely on a mailing to carry your message to the voting public.

Remember that door-to-door canvassing is the staple of successful campaigns.

Billboards

If you're fortunate enough to have sufficient campaign monies, consider purchasing billboard space. This form of advertising can be quite effective, however, be certain you know (and are guaranteed in writing) which billboards will carry your message. It's necessary to make arrangements for billboard space early in the campaign in order to get the best locations within your community.

News Media

Radio spots can be effective vehicles for a candidate's message. These, too, are expensive and the candidate will find it difficult to control their

broadcast time. The same applies to television, an even more expensive form of advertising.

Don't feel that you have to advertise in newspapers or radio or television in order to mount a winning campaign. Newspaper advertisements in general are not a good investment for a school board candidate. Depending on your community, their expense might not be outweighed by the dividends of increased name recognition. Yard signs usually are better investments.

Campaign planning should include a hard-nose cost/benefit analysis comparing the various communication methods. Know how much of your budget is allocated for publicity. Then determine, for example, the exact costs of printing weather-proof yard signs and running a series of paid advertisements in the local newspaper. Unless the advertising is substantially cheaper, select yard signs. If you prefer a mixed strategy, then emphasize yard signs.

Take advantage of free media publicity outlets such as letters to the editor and your own news releases. Letters to the editor effectively attract the attention of community opinion leaders (those persons reading the editorial page)—something that no paid advertising can guarantee. Newspapers might print your news releases, but don't count on all of them seeing the light of day. Much of the impact of the published ones will depend on their placement or location in the newspaper. However, news releases help communicate your message and therefore are worth the effort.

Another type of free publicity is to "appear" on a local radio call-in show. These programs often draw huge followings and can provide a way to communicate with citizens who aren't easily accessible through other means. Consider shows with topics other than education. The important goal is to convey your name and image to the listeners.

GET OUT THE VOTE

A well-organized campaign culminates with a get-out-the-vote effort. The purpose of all campaign activities thus far has been to communicate your message to voters and to gain their support. This work is in vain if your supporters don't cast their votes. A candidate should never forget that most voters have other things on their minds besides the election. The candidate, whose life is focused on the election, must realize that many voters will never give a moment's notice to this event. Therefore you must conduct an organized election-day effort to remind supporters to vote.

Plan to conduct this activity in two ways:

1. *The first and best method is to organize canvassing teams in each precinct.*

Select as precinct captain one of your steadfast supporters who lives in that precinct. The captain should identify four or five others to help with canvassing. About three to five weeks before the election, the canvassing team visits each home in the precinct and



Evaluate the cost of each promotional item used in the campaign in terms of its cost and how effective it is in obtaining positive voter support.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.14 (preface).

asks the residents who they support in the school board election. If your name is identified, then thank the person and leave a copy of the campaign brochure. Write these names and addresses on a list of persons to be contacted and reminded to vote on election day.

If the resident indicates support for the opponent, then simply thank the person and leave. Many people will say they have no preference. In this case, ask them to support your candidacy and leave a brochure. Some of these names also should be added to the "persons to be called" list.

Door-to-door canvassing is the best way to get out the vote because it most effectively impresses voters. This method depends on having enough campaign volunteers to conduct a precinct-wide canvass.

As the candidate, you should participate in as much door-to-door canvassing as your schedule allows. This is the best method to establish your name and image with potential supporters.

2. *Residents not contacted by door-to-door canvassing should be called on the telephone.*

The process works the same way except a campaign volunteer calls the voter instead of knocking on a door. The effect is the same, but the positive results are fewer.

If you have implemented your plan effectively, you should have a list of names, the total of which is more than the number of votes your initial research indicated was needed to win the election. Strive to get a surplus of names because, despite your best efforts, some people on the list will not vote. If you have not used friend-to-friend cards, or perhaps even if you have (and the budget permits), mail a reminder-to-vote card to each person on the list. The card should arrive a day or two before the election.

Beginning at noon on election day, all the people on the list should be called and asked if they have voted. If the person has voted, say thank you. If the person has not voted, issue a polite reminder.

If you have enough volunteers, ask some of the recruits to work as poll watchers on election day. The poll watcher takes each precinct's list of supporters and checks off the names of voters entering the polls. The remaining names on the list are the persons who should be called and reminded to vote. This activity should be scheduled for two to three hours before the polls close. Have other volunteers pass out brochures to voters arriving at the polls. However, make sure that the volunteers know and strictly observe the state law governing polling place activity. (Refer to Part II, Chapter 7 for more details and exhibits on poll watchers.)

CONCLUSION

The secret to winning school board elections is research, planning, and organization followed by a lot of hard work. This combination of thought and effort is absolutely essential. A successful campaign for a school board seat therefore requires the following:

- **A Clear Message**

The winning candidate presents a clear, easily understood, and concise statement of purpose.

- **Repetition**

The winning candidate repeats the message over and over again. It is a mistake to vary it from day to day or from audience to audience. Such a strategy only creates confusion.

- **Good Organization**

You must organize and refine every aspect of your campaign. Leave nothing to chance. Make no assumptions. Know your political community. Get the support of groups and opinion leaders that influence the views and actions of other citizens.

- **Hard Work**

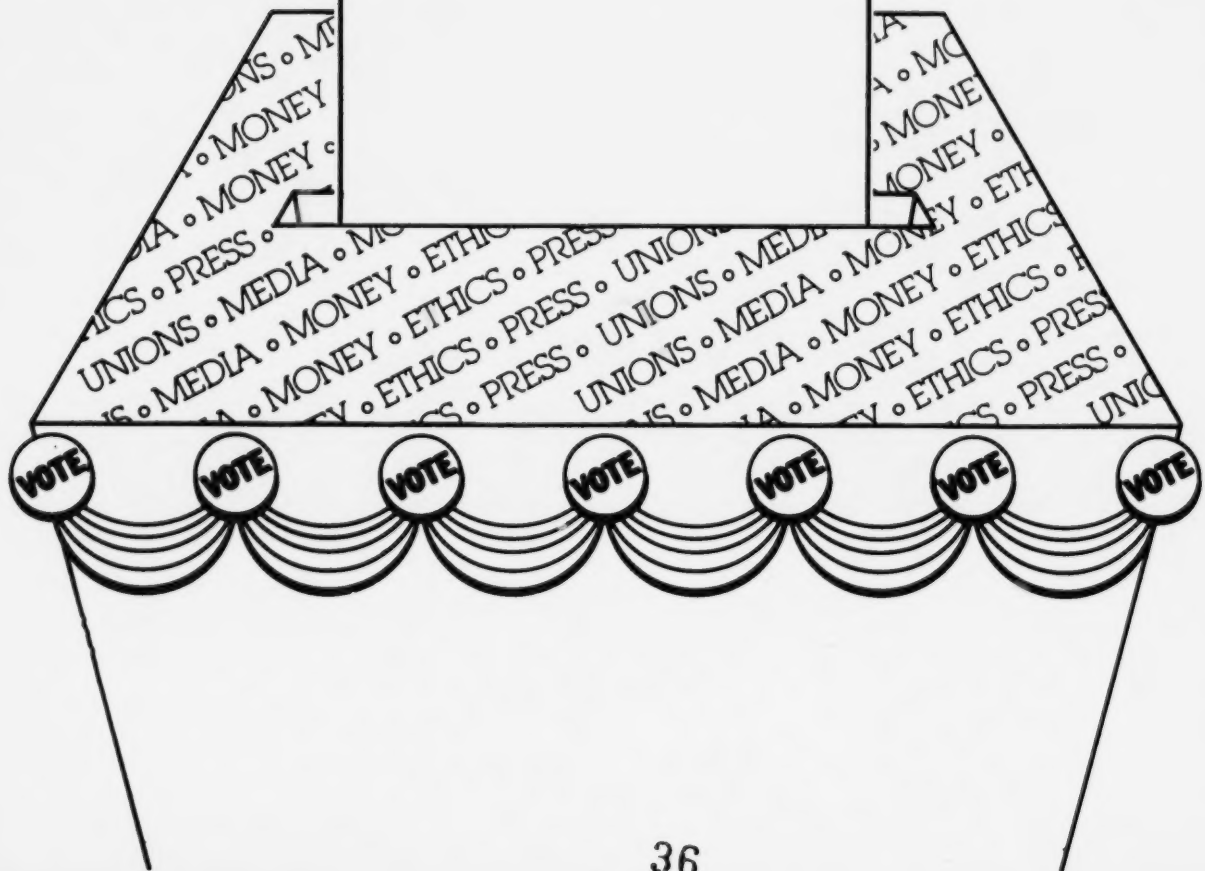
Campaigning is hard work. It takes a lot of it by a lot of volunteers to lead to victory on election day.

- **A Good Candidate**

And of course a winning campaign needs first and foremost a good candidate, one with intelligence, integrity, energy, insight, and a compelling desire to serve the educational interests of those for whom the schools exist: children.

PART II

SCHOOL REFERENDUM CAMPAIGNS



CHAPTER 3

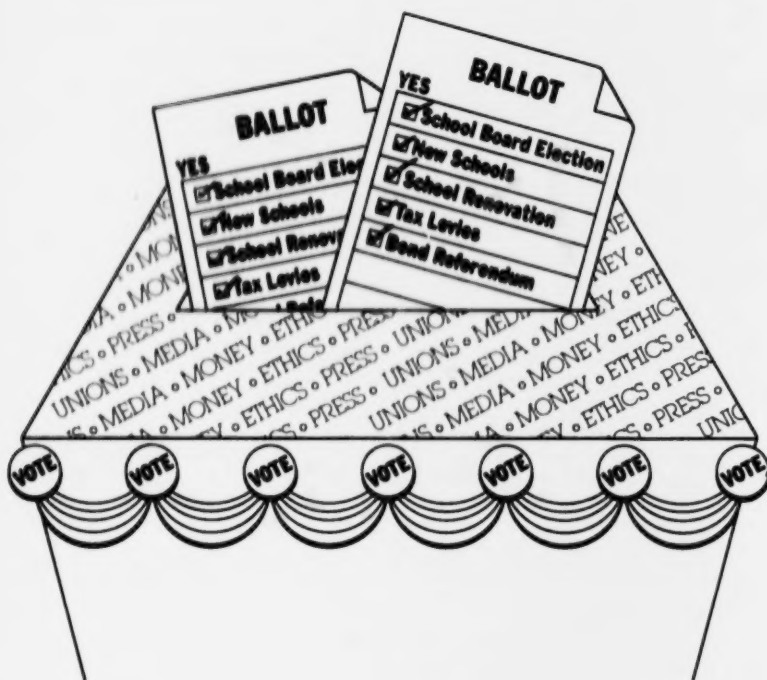
CAMPAIGN PRINCIPLES

11 LESSONS IN SUCCESS

INTRODUCTION

Each referendum campaign is unique. The differences among them result from the character of the school system and community as well as from the personalities of the campaigners. Nonetheless, school elections share certain traits. Understanding the relevant political principles is indispensable to election success. This knowledge will help you plan a successful referendum for school levies, construction, renovation, or consolidation.

Campaign principles, described simply, reflect the basic political behaviors exhibited in general elections. Use the principles as signposts for pursuing campaign goals and as guides to avoid the many paths to failure.



In the U.S., where more than half of all boards must have their budgets approved by popular vote, and 40-90% of those budgets are funded by local taxes, even small swings in public opinion can have a major impact on the education community.

Jeremy Cato, "Raw Democracy Destabilizes Education," *Education Leader*, (Aug. 12, 1988), p.13.

The 20th Annual Gallup Poll of the Public Attitudes Toward the Public Schools (1988) reveals a statistically significant increase in public willingness to pay more taxes to help raise the standards of education in the U.S. In 1983 when the question was first asked, 58% were in favor and 33% opposed paying more taxes for this purpose. In 1988, about 64% said they would pay more, 29% opposed the idea, and 7% said they didn't know.

The history of school boards illustrates their involvement in decisions concerning tax levies and the distribution of public resources. Without a doubt, these functions are political and as such are carefully scrutinized by our constituency.

Robert Haderlein, speaking on "How To Use Good Politics in School Board Service," 1985 NSBA Convention, Anaheim, CA.



Nothing irks taxpayers—and voters—more than a waterfall of financial figures and formulas couched in fiscal jargon that only an accountant can understand. The budget you are asking voters to approve, or the community to accept, must be reduced to people terms, to common, everyday language easily understood by the man in the street.

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1977), p.9.

The pioneer voting studies discovered the importance of conversation as a source of information about politics; the presence of a multitude of informal opinion leaders sprinkled though all social strata; the selectivity of conversation, and the two-step characteristic of the communication process, from the mass media to the mass of voters via the opinion leaders.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.138.

ELEVEN SUCCESS LESSONS

Lesson One. A school election is a political campaign.

Many school referenda are lost because board members and administrators fail to understand that *all* school elections are political in nature (not educational as such). A review of school campaign literature underscores the point. Often brochures of two to four pages in length detail the background of the ballot proposals and then attempt to answer all of the voters' questions.

"The objective of campaign literature is to inform the electorate." A noble mission?—Yes! A successful one?—Seldom! The goal fails to consider the needs of voters, most of whom will throw away a long-winded brochure never having read its content.

Each campaign has an education phase but it always should precede the actual campaign. (See Exhibit B.)

It's impossible to educate a sizable segment of the electorate on the need for a tax increase or school construction for exactly the same reasons a political candidate cannot discuss issues in any serious sense during a campaign. The majority of voters will not give you enough time to explain the situation.

The education phase must come long before the election phase of the campaign because it generally requires months of preliminary work. Informing citizens on the need for the projects or on the financial condition of the school system occurs mostly during the education phase. Campaigners usually commit a fatal error by trying to educate the electorate while at the same time urging school supporters to vote.

The election phase is patterned after a victorious political campaign. Successful campaigns have two goals: identify supporters and urge them to vote. Resist the temptation to *overload* the voting public with information during the election phase. Keep campaign publicity simple and to-the-point. By limiting the number and density of campaign promotions, you will increase their overall impact.

Although education is still a byproduct of some election-phase activities, the planning emphases of the two stages should remain distinct.

School leaders must learn and remember the *political ABCs*. Extensive and varied studies of voting behavior conducted in the 1940s and 1950s and since confirmed reveal some basic information on how and why a person casts a particular vote on election day. Which of these factors is most important among your local voting public should be determined by studying the political dynamics and voting trends in the community.

EXHIBIT B

EDUCATION PHASE & ELECTION PHASE
(YES Vote & Community Crusade Campaigns)

FOLLOW-UP ACTIVITIES

File Campaign Report

ELECTION DAY

Analyze Vote

Say Thank You

YES VOTE CAMPAIGN

COMMUNITY CRUSADE

GET OUT THE VOTE

1 month before the election

2 months before the election

3 months before the election

4 months before the election

5 months before the election

6 months before the election

7 months before the election

8 months before the election

9 months before the election

10 months before the election

11 months before the election

EDUCATION PHASE

Complete Organization Assignments Telephone Canvassing
Friend-to-Friend Cards

Recruit Volunteers Schedule Coffees
Door-to-Door Canvassing

Identify First-Round Volunteers Locate Headquarters
Build Campaign Organization

Identify YES Votes

Analyze Community Views

Election Campaign Begins

Complete Organization Assignments
Friend-to-Friend Cards
Telephone Canvassing

Door-to-Door Canvassing
Recruit Volunteers
Schedule Coffees

Locate Headquarters
Build Campaign Organization
Identify First-Round Volunteers

Obtain Endorsements
Media Contacts

Identify YES Votes

Analyze Community Views

Election Campaign Begins



Why is there an apparent increase in such campaigns? Several factors tell why:

- **Replace aging and deteriorating facilities.**
- **Decrease in student/teacher ratios.**
- **Increased need for classrooms for handicapped pupils, art, physical education, music and similar programs.**

Jeannie M. Henry, "Help for Passing Bond Referenda," *School Business Affairs*, (Dec. 1987), p.25.

- Voter opinion is relatively stable during a campaign (i.e., rarely do voters change their minds).
- Voters tend to decide early in the campaign how they will vote.
- Persons who change their positions during the campaign usually do so because of *cross-pressures*, or conflicting attitudes. Cross-pressured individuals often decide not to vote at all. As an example of cross-pressures, a voter's belief in quality education might conflict with its increasing demands on his or her property taxes. If school campaigners can identify groups who are experiencing cross-pressures, they can target their information to offer a compromise position that emphasizes school needs.
- Voting is a social activity both in terms of the decision to vote and who or what position to favor. Voters identify with certain social, cultural, or political groups that serve as reference points for their views and actions. Opinion leaders (representing the groups) in effect function as interpreters of information conveyed in the media. A friend, relative, business acquaintance or some other personal influence usually is responsible for persuading a person who had not expected to vote to do so. In so far as possible, campaigners must work closely with opinion leaders to develop the school proposal and campaign strategies.
- Voter decisions on a particular ballot often are affected by their general views. For example, in politics a person's identification with the Republican or Democratic Party predisposes a more favorable reaction to the candidate of the same party. In school elections, the public image of the school system and the popularity of individual school board members and the superintendent will affect voters' evaluation of the specific ballot issue.

Lesson Two. *Few people really care if the referendum passes or fails.*

Almost no one cares *deeply* about the outcome of an election except the persons directly involved in the campaign. Even when a tax increase to fund higher teacher salaries is on the ballot, a significant number of teachers will not vote. Your school system's experience won't be unique in this matter.

The explanation of this phenomenon is that we all have different sets of priorities: what is important to you is not always important to me or at least not as important to me as it is to you.

Although I'm a teacher and therefore a school supporter, it may be more important for me to go fishing on election day than to go to my neighborhood voting precinct. Question: If we can't get all teachers to the polls when their own self-interest would seem to demand it, how can we so motivate other citizens who are not directly affected by the outcome of a school election?

The challenge to increase the size of voter turnout for a school election has existed for decades. Since the 1950s the percentage of registered voters participating in presidential elections has steadily declined (an average of 62 percent during the years 1952 to 1968 to 50 percent in 1988) despite heightened media coverage. How can school systems expect to marshal enough support for schools—especially in areas of the country where nonparents outnumber parents?

You should not presume that even former stalwarts are supporters of the upcoming campaign. This statement applies to members of the school board, teachers, staff members, parents, and others.

Each person must be convinced that his or her support is instrumental to the final outcome of the election at hand.

Ways to accomplish this will be described in later chapters.



What if they held an election and nobody showed up? Although tradition has drummed into our consciences that to cast the ballot is our solemn duty as Americans, come November more than 60 million—nearly half of all eligible voters—probably won't go to the polls. These are the no-shows who in customary post-election agonizing are accused of civic sloth and apathy.

Don Oldenburg, "Voting: Yes or No?"
Washington Post, (October 18, 1988).

One of the factors contributing to the generally low voting rate in school elections through 1970 was that in 14 states only taxpayers could vote. . . . The "taxpayers only" era was ended on June 29, 1970 by a Supreme Court decision. The familiar rationale for this anachronism, i.e., that only taxpayers have a stake in bond elections, was rejected by the Court on two counts. First, all residents of a community are affected "substantially" as consumers by bond questions relative to the provision of public facilities. And second. . . that only taxpayers pay taxes.

Howard D. Hamilton and Sylvan H. Cohen *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.49.



Yet turnout for local referenda is normally substantially less than turnout for national elections. Even in the only American electoral situation that offers the citizen a direct role in making political decisions... the New England town meeting—citizen participation has been found to be substantially short of potential.

Philip K. Piele and John Stuart Hall,
Budgets, Bonds, and Ballots, (Lexington,
MA: Lexington Books, 1973), p.33.

Lesson Three. Most people are slow to act.

We always can find reasons to delay doing something until tomorrow. Therefore, when forming an organization, pay special attention to describing—in writing—each campaign job and responsibility. Also, provide incentives for on-time performance of assignments. Otherwise every stage of election activity likely will require two or three times as much effort as first estimated.

One of the unsung facilitators of a successful campaign is *persuasion*. Successful campaign people are accomplished in this art. A good campaign manager pushes people faster than they normally want to move, all the while walking the thin line between prodding and provoking hostility (which itself could change YES votes to NO votes).

Lesson Four. Focus on the YES votes and ignore the others.

Winning campaigns identify school supporters and get them to the polls on election day. Many losing efforts waste limited resources trying to educate every voter in the community about the election issues. Remember, a referendum is a political—not an education—campaign. It is a waste of time trying to convince NO voters that you are right and they are wrong. Instead spend your resources finding an additional YES vote to counter each NO vote.

It's important to establish a speakers' bureau early on. The purpose of the bureau is to schedule speaking engagements with groups projected to support the schools. After all, the primary goal of campaign speeches and question and answer sessions is volunteer recruitment, not education. A winning campaign strategy is based on as much direct contact with prospective YES voters as possible—and on as little contact with broader audiences that might contain prospective NO voters.

School campaigns find it advantageous to form two-person speaker teams, each with a school staff person and a citizen. The citizen takes the lead role; the staff person serves as a resource person and administrative coordinator to handle the more technical or detailed questions. This approach also solves the problem of a speaker being unable to fulfill an engagement.



Winners don't take the campaign message to everyone. They know who they need at the polls to win, and they target their efforts at these critical audiences. This means some people get less attention than others...and some may not get any attention. In an election, some people are more important than others. The important people are those who will vote...and those who will vote YES are most important.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.

First, you have to find out who is going to vote YES. Then you have to make sure they are registered to vote. Then you have to make sure they get to the polls.

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1977), p.54.



Lesson Five. Plan and organize.

Know your targets. Develop techniques for thanking the YES voter. Give them reasons to support you and ask for their vote. Then get these people to the polls on election day.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.

We knew the support was there, so we focused our campaign on cultivating that support and encouraging supporters to go to the polls.

Michael Krop, "How America's Billion-Dollar School Board Is Gearing Up for Growth," *The American School Board Journal*, (Feb. 1989), p.22.

Disorganization courts election-day disaster. Develop a plan based on your knowledge of the political context of the election. The campaign plan must be *understood and supported* by all persons assigned election responsibilities.

The campaign manager must have enough authority to withstand the many sources of campaign pressure. For example, if a decision is made not to purchase paid newspaper advertising, the campaign manager should resist the school board member who later demands that ads be used immediately.

The important advice is to develop a campaign plan and follow it closely from the outset. A plan that changes from day to day is no plan at all. A successful campaign needs wise planning and clear communication to all campaign leaders.

Lesson Six. Recruit as many volunteers as possible.

Many believe mistakenly that a campaign needs only as many volunteers as there are organizational slots to fill. This approach is one that loses elections. A volunteer contributes more than time spent telephoning, leafletting, and envelope stuffing. Anyone who is a potential YES voter is a potential volunteer as well.

Therefore, develop a campaign plan to accommodate as many volunteers as you can recruit. This is not difficult to accomplish if the goal is central to your campaign plan. The best way to assure that people will vote YES is to obtain their commitment to help in the election.

Warning: Provide volunteers with constructive campaign work. This requires planning and organization. But it is worth the effort. Unless volunteers feel they are doing something that is contributing to the success of the campaign, they will become discouraged and could lose interest in the election. Take good care of your YES voters!



The objective is to get citizens who are interested in a specific aspect of the school program to personally become involved.

William F. Kromer, "The Election is Over, What's Next?" *Michigan School Board Journal*, (June 1988), p.23.

The success of the external marketing plan depended on the effectiveness of our organizational chart. The selection of the honorary chairpersons was critical as they were attention getters who like to win and work hard. . . . The most critical detail involves selecting the right chairperson, and keeping the task manageable for that person. All efforts within the campaign should focus on the direction established by the strategy committee.

Timothy G. Nusbaum, speaking on "The Use of Internal and External Marketing To Turn Critics into Fans," 1987 NSBA Convention, San Francisco, CA.



Lesson Seven. Have a winning team spirit.

The community can sense a defeatist attitude on the part of the school district, and the spark, the drive, the spirit necessary to carry out a successful campaign will never be realized. If you don't honestly and objectively believe you can win, don't get on the ballot in the first place.

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1974), p.12.

Winning becomes job number one... because an unsuccessful election can damage morale and dramatically affect the educational program in the classroom. Winners mobilize their resources and do what needs doing to make sure election day terminates with a victory party.

William J. Banach, "Here's to the Winners," Tennessee School Boards Journal, (Summer 1986), p.17.

It is important to project confidence about the election outcome. If you don't, it will be difficult to recruit volunteers. First, believe in the campaign plan. Then contribute the maximum amount of time possible working toward its implementation. And always but always be enthusiastic about the campaign, no matter how much your head or feet ache, no matter what a heckler shouts, no matter what a journalist prints.

An election vignette illustrates this political truth. A follow-up study was conducted approximately one month after a California school referendum passed by a 52 percent to 48 percent margin. Of the voters surveyed, 68 percent said they had voted YES in the election! The lesson: most people want to be on the winning side. If they sense victory, they will be with you even though they are only lukewarm to the ballot proposals. If on election day such persons don't go to the polls, at least they will not have cast NO votes—usually because they have seen it as a fruitless gesture.

Put in the simplest of terms: talk and act like a winner at all times!

Lesson Eight. Maximize the amount of personal campaigning.

The most persuasive contact is the most personal one. Consider the difference a personal approach makes: You run an advertisement or a story in the local newspaper asking for citizen support on election day. The great majority of people do not see the message and only a small minority see, read, and respond to your invitation. As an alternative, send a letter requesting support. This is a more personal and effective way to deliver your request, especially if the letter is addressed with an individual name rather than to "resident," "friend," or some other general category.

The most effective method, however, is to visit homes, knock on doors, and ask for support. This personalized approach is both difficult and time consuming, but it works! Of course, you can't canvass every home. Developing a prioritized list of communities should be part of the planning process. In fact, most people are so impressed that you cared enough about the election issues and about their vote that they will erase any lingering doubts about the referendum. Additionally, door-to-door canvassing is a perfect way to recruit more volunteers—another plus. All and all, personal contact is the most persuasive means to increase the number of YES votes cast on election day.



Most people vote YES because somebody asks them. They vote YES because they believe the schools are good...or the children need support...or better schools are the American way.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.

The central message is that we are fairly secure in asserting that parents of school-age children are more likely to vote in school financial elections than are nonparents, and citizens who express interest in the school are more likely to vote than are citizens who express no interest.

Philip K. Piele and John Stuart Hall, *Budgets, Bonds, and Ballots*, (Lexington, MA: Lexington Books, 1973), p.43.



Lesson Nine. Good planning makes time your ally, not your foe.

The lead time of bond proposals necessarily is usually long, and it may be substantial for operating levies (except renewals). It takes time to formulate proposals that are feasible, technically and politically; it may take considerably more time to prepare their way to the ballot. There is a consensus among school people that precampaign activities are indispensable and exceedingly important. The assorted activities may be grouped under three somewhat sequential categories: building community support for its schools, laying the groundwork for an election, and formulating proposals and making the decision "to go."

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.95.

Do not schedule a referendum without having sufficient lead time. A minimum seven-month period from the time school officials first officially discuss the referendum is needed for an effective election effort. This schedule assumes the preliminary education phase is complete, or almost so, prior to planning the election campaign. Adequate preparation and planning are crucial to successful elections. The election phase can be conducted in less than seven months, but only at the risk of placing time on your opponent's side.

Lesson Ten. Obtain the time and energy of people, not just their names.

There was a time, not too long ago, when a school election could be won with the endorsement of the "right" person (or persons). There still might be some communities where this procedure works, but they are few in number. Of course, formal endorsements always are welcome, but it is far better to receive personal commitments of time and energy than to get a list of names on some sort of endorsement petition. Besides, an offer of time usually carries with it the use of a name. More citizens will be persuaded to vote YES by asking for their help in the campaign than by trying to impress them with a newspaper advertisement or leaflet listing the names of supporters.

Pursue both activities according to the personality of your school community balanced against the available campaign resources. All other things being equal, however, receiving volunteer commitments will win more votes than will media advertising.



The days are gone, in most school districts throughout this country, when a few speeches by the superintendent, a news release or two, an editorial in the local paper and a general, relatively innocuous mailing to local residents would result in a YES vote.

Now it takes an all-out effort by a great many educators, parents, civic groups, and interested citizens, welded into a highly functional campaign organization, to be successful at the polls with a school finance election.

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1977), p.7.



Lesson Eleven. Never launch a referendum with a divided school board.

Districts whose board members disagree over the desirability of a bond issue are less likely to pass school bond issues than are districts whose board members agree on the need (or lack of need) for the bond issue.

The more board members agree on the factors affecting school community relationships, the greater the district's portion of favorable votes in a school financial election.

Philip K. Piele and John Stuart Hall,
Budgets, Bonds, and Ballots, (Lexington,
MA: Lexington Books, 1973), p.77.

A split board on a referendum can kill the vote. . . . Seventy percent of the referenda campaigns with split boards were defeated!

Referendum Kit, (South Carolina School
Boards Assoc., 1988), p.3 (preface).

A school board whose members have not reached a consensus on the content and format of the referendum should not embark on a campaign. Conducting an election under these circumstances is like running a race with one foot in a bucket. It is possible to run and win, but the competition had better be slow!

In a study conducted by the South Carolina School Boards Association, referenda campaigns burdened with a split board lost 70 percent of the time.

People need to believe in the causes they support. If a board member (who the public presumes has a good understanding of school matters) does not support the ballot, why should the less well-informed voter? The negative vote of only one board member on a resolution to conduct a referendum is a ready excuse for a voter to cast a NO ballot on election day.

Conducting a referendum endorsed by a split board means that you will spend at least a portion of the campaign explaining why some of your board members are right and others are wrong. This is neither a comfortable nor a productive use of time. It is important that board members appreciate the implications of a split board vote so they will work together in a spirit of compromise and mutual understanding. A united front is the only way to kick off a school campaign.

CHAPTER 4

STEPS TO SUCCESS

Step #1: Assess Community Views

You must stay in touch with public attitudes before and during any campaign. Knowledge of public attitudes regarding schools will affect the scheduling, content, and format of the ballot as well as your choice of pre-campaign activities and election strategies. Feedback between school leaders and the community they serve is essential for election success and for quality education. For example, are the schools seen in a generally positive way or do people (or certain groups) hold negative attitudes? Endless sources of possible dissatisfaction with schools exist, ranging from reports of assaults on teachers, vandalism, and fights among students to declining standardized test scores or a recent increase in the price of school lunches.

Experienced administrators and board members understand these signs and read them continually. But more sources of information usually are needed before launching an election campaign. Obviously, the election effort is easier if the public holds the school system in high regard. If, on the other hand, voters perceive the schools as unresponsive to pupil and parent needs or as poor managers of tax dollars, they likely will vote NO when confronted with a financial request.

All school systems have problems, but in some the problems are more pervasive (or at least more visible) than in others. It is important for board members to identify and to understand the school system's weak spots before asking voters to approve a tax increase or long-term debt obligation.

There are a number of ways to obtain this information: 1) conversations with opinion leaders; 2) conversations with citizens; 3) surveys and polls; 4) focus groups; 5) past school election data; 6) and the public image of the school system.

1. Talk with community and public opinion leaders.

Include in your informal discussions local officials, school employees (especially teachers), union officials, the press, and community leaders. This traditional method of assessing public opinion easily can supplement the use of formal polls and focus groups. In addition to providing information, this method can build bridges of support to these influentials—support that can be of extraordinary benefit during the campaign.

Although the relevant persons will vary according to the school system, also consider these groups when compiling your list: chambers of commerce officers, attorneys, doctors, bankers, religious leaders, political party chairpersons, realtors, and leaders of youth, school advocacy, and cultural groups.



Know your community or your campaign is in trouble from the very beginning. And be aware that a recent study of 1,000 bond elections in Iowa showed that at least 75 percent of the voters made up their minds the very first time they heard of the issue. So your first announcement must be well-planned, well-put-together, and well-publicized. Also the simpler the issue, the better its chance of passage.

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1977), p.11.

Side issues can effect a referendum campaign. In a survey of South Carolina school districts holding referenda campaigns since 1974, about 70% of the campaigns that lost had side issues to surface. No side issues appeared in 77% of the campaigns that won. [Examples of side issues include credibility of administration and school board, too much money requested, private vs. public schools/rich vs. poor, and recent reassessment of property.]

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.1.



Begin marketing by conducting a community attitudinal survey. Use it to start a dialog with your consumers. As you listen, you'll learn about your marketplace, what it needs and wants, and what it is willing support.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.17.

The one trend showing up in every survey we conduct now is that the voters are not looking at the school system in general. Instead the attitudes and opinions which have a direct bearing on voter behavior are being formed at the individual building level. . . . many people who vote NO in a school election do so because of problems they perceive at the local school level.

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1977), p.63.

To gauge public reaction, we commissioned a telephone poll of 600 county residents, which was followed by two additional surveys by our teacher union. . . . The surveys provided useful information about our constituents—especially about minority and elderly voters—that helped us plan our campaign strategy.

Michael Krop, "How America's Billion-Dollar School Board Is Gearing Up for Growth," *The American School Board Journal*, (February 1989), p.22.

Take time to note who among them express support or opposition to the schools and why. This information will prove useful during the campaign.

2. During casual conversations how do citizens talk about the schools?

Another way to assess public attitudes is to visit the hair stylist, "Bill's Diner," or the grocery store on a crowded evening when you can expect to wait in long check-out lines. Use these occasions to talk with people about local schools.

A problem with this technique is that citizens often are too considerate to speak forthrightly if they know you are the school superintendent or a board member. Therefore, if possible, don't volunteer your identity. Regardless, solicit candid views—and resist the temptation to convert, educate, or defend. Simply solicit views.

If responses are more negative than anticipated, consider this valuable knowledge that will help you prepare for public appearances. Seeking out public reaction—even the criticism—is an important first step toward winning support for schools. You'll have let critics know that you really care about their views. This, in turn, will make the public more receptive toward school improvement issues.

3. Conduct community surveys and pre-referendum, campaign, or post-election polls.

Polls can provide crucial information on the timing of a referendum; the optimal size of the financial request; the type of programs and services the public would fund with increased taxes; and the level of current knowledge about the school system. By commissioning more than one poll (e.g., pre-campaign, campaign, and post-campaign polls), organizers can assess the effectiveness of various campaign techniques. For instance, initially uncommitted voters can be divided into groups, with one reached via personal contact, another by brochures, another in small groups, and so forth. The purpose of the second poll is to assess the effectiveness of each method. Use the results to allocate your campaign resources most efficiently.

Post-election polls are indispensable, especially if the referendum is defeated. Based on precinct vote totals, pollsters can find out why in 15 percent of the precincts voters rejected the ballot by a two to one margin. This knowledge should form the basis of future school improvement plans or a revamped public relations effort.

Several words of caution on polls. A clearly defined purpose, type of sample, and method of conducting the poll should be specified in advance. Some school systems will have staff capable of overseeing the effort; others will hire the services of a consul-

tant or private survey research firm. Polls conducted to gather information about public expectations and views on the schools are legitimate expenditures of public funds if they don't occur within the context of election planning or a campaign. Otherwise, polls should be paid for by private funds.

Polls are only as good as the questions asked, the determination of who is polled, and the data analysis. First: whose opinions do you want to know? A poll of "residents" is a far different sample than one of "registered voters." "Parents of school-aged children" or "registered voters ages 45 or older"? Most polls take a representative "sample" of the selected group rather than polling each person.

Second: make sure the questions are clearly worded and unambiguous. This advice applies equally to yes/no, multiple choice, and open-ended questions. Avoid emotionally charged or value-laden phrases. Each question should target only one opinion (e.g., the question: "Do you think that taxes should be raised to improve teaching?" confuses two separate issues—improving teacher performance and how to fund it. Perhaps the person thinks that teaching should be improved but without raising taxes.

Polls can be conducted by asking questions on a form sent through the mail, on the telephone, or during face-to-face interviews. Written questionnaires are the least expensive and easiest to conduct because they require little manpower. However, the response rate is the lowest, often less than ten percent. Another disadvantage is that written polls cannot gauge the intensity of the response.

Telephone polls are relatively economical and have a higher response rate compared to mail surveys—if the persons on the telephone bank have been trained properly. But nonverbal responses cannot be evaluated and the brief amount of time allotted to each call usually isn't conducive to establishing a rapport or conveying other information.

Michael Y. Nunnery and Ralph B. Kimbrough (*Politics, Power, Polls, and School Elections*, Berkeley, CA: McCutchan Publishing Co., 1971, p. 100) recommend using personal interviews. This method more accurately assesses the opinions and views of the respondents, and the process itself can positively affect the person's attitudes toward the schools. However, the method requires more time and resources than do mail or telephone polls. Also the interviewer's bias can exert more influence on the recorded responses.

4. Invite citizens to discuss school issues and priorities in focus groups.

Assembling small groups of representative citizens on a regular basis to elicit their views on school issues is an increasingly popular "assessment" technique. The forum goes beyond the



At election time winners use surveys to assess their chances of winning. And they use the results to amplify strengths and take action on the weaknesses.

Winners know what's happening around them. They understand the educational aspirations of their community. They know what people like and don't like, what they need and don't need. And they tailor educational efforts that are in harmony with the citizenry.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.17.

Several school board members have noted that timing of referenda is tricky: Too early in the planning process and the public doesn't see the immediate need for the buildings. Too late and there may be costly delays, more busing and the use of trailers while funds are sought through other sources or a new referendum.

Steve Bates, "Voters' Role in School Borrowing Debated," *Washington Post*, (Jan. 12, 1989).



Public relations in the school business... means effective communication with your staff, with parents, with the media, and with the community in general. All of us in education are communicators, from the board president to the school custodian. The district that takes its communication role seriously, is the one that will receive the greatest support when a bond issue comes up or a crisis arises. Public confidence cannot be bought, we must earn it through our daily actions as communicators and through a planned communication effort involving the entire school district family.

Karen H. Kleinz, speaking on "Effective PR Programs Without Big Price Tags," 1987 NSBA Convention, San Francisco, CA.

school board "regulars" (i.e., the few citizens who attend most board meetings to give their views on agenda items) or disgruntled parents who call school board members to complain about a boundary or grading policy. Focus groups offer the opportunity for citizens to elaborate their views, something that most polls do not.

These groups long have been used by advertising agencies and research divisions of large companies as a way to predict consumer trends.

Ideally, limit the size of each focus group to ten. Make sure each group is representative of the larger population whose views you are polling. Names can be culled from voting lists, organization membership rosters, or school-based lists of parents. Invite each person individually. If a written invitation is sent, then follow up with a phone call.

Develop three or four discussion or issue questions. A group leader (a neutral party) serves as moderator, but after the discussion begins allow no further interruption by the leader except to ask the next question. Limit the forum to one hour. If possible, arrange to videotape the session. Otherwise, tape the discussion on an audio cassette. After transcription, a report on the focus group should be prepared.

5. Analyze past school elections.

First, review the results of the most recent school election. By what margin did the ballot pass or fail? Was there a consistently large block of NO votes cast? Was the popularity of the school board or superintendent a factor? Then evaluate electoral data on school elections during the last decade. Identify any trends or changes in voting patterns among different demographic groups. Give added weight to the results of the most recent election. If the last election occurred more than five years ago or the administration or majority of board members are new faces, the analysis will be less useful. Nevertheless, make it your starting point.

6. Assess the public image of the school system.

Consider your answers to the following questions:

- *What is the quality of public participation at board meetings?*

Do groups of "concerned parents" complain about administrators, teachers, textbooks or whatever? Some superintendents operate under the "no news is good news" philosophy, believing the lack of public participation indicates general satisfaction with the schools. However, this attitude is reasonably safe only when coupled with a genuine openness and receptivity to problems as they arise. If parents

and others feel that "the board and superintendent really don't care what we think," then the danger signals might not be apparent until too late.

- *How do the news media cover school board meetings and other school concerns?*

Is the general tone positive? Or do accounts suggest tension between the board and superintendent or between members of the board? Do not overlook this measure of community support. News reports form the basis of the average voter's impression of the schools. Even those who do not often read the papers or listen to the broadcasts receive word-of-mouth information from others who do.

In a typical school system only a minority (23 percent) of the parents of school-age children are involved directly with the schools (other than in activities involving their children). The only other information most parents and voters have is indirect, through relatives, neighbors, and information gleaned from newspapers, radio, and television.

In general, people do not like controversy and contention. They prefer that institutions operate quietly and efficiently. If there is a deep ongoing rift between board members or between the board and superintendent, the conflict might well affect the level of citizen support for schools. It is harder to ask voters to support a ballot request in a divisive school environment.

- *Do citizens at social gatherings criticize the schools to board members, the superintendent, and other administrators?*

Criticisms of schools at social occasions probably indicate deep-seated trouble. Most people are nice enough not to bring up unpleasant matters at such events unless the frustration level is high.

A number of methods have been described to give school leaders a diverse information data bank to assess community views. Reliable knowledge in this area is crucial to the decisions on scheduling a referendum, the content and format of the ballot, and appropriate campaign strategies.

If community views are not what you would like, then take action to improve the situation before announcing the referendum. Allow sufficient time for this process. How long depends on what actions are necessary and the amount of excitement and attention that are devoted to the effort.

If schools are perceived as poor stewards of the tax dollar and if the perception is accurate, then plan to change the fiscal policies with as much fanfare as possible. (But remember to bring out the trumpets *only* in non-election environments; during an election campaign fanfare often creates unwanted controversy and unneeded NO votes.) If the perceptions are inaccurate, then consider revamping or enhancing your public relations program. Again, with as much fanfare as possi-



Perhaps the most effective component of our campaign focused on Dade County's large senior citizen population... we were heartened when our surveys showed that senior citizens would support the bond issue if we convinced them it was needed.

Michael Krop, "How America's Billion-Dollar School Board Is Gearing Up for Growth," *The American School Board Journal*, (Feb. 1989), p.22.

Consider appointing a "Blue Ribbon Task Force," to assess the building needs and make recommendations to the board. Make sure some representatives from the community are appointed who can play the "devil's advocate." Discuss possible negative issues affecting the proposed plan. This committee must have all facts, figures, and studies to substantiate the building needs of the district.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.5 (preface).



Winners understand that campaigns don't win elections. They know year-round educational marketing programs do. Campaigns are conducted to harness support that already exists... and support exists when people are listened to and talked with—when their needs are addressed on a regular basis.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.17.

Other examples which have helped turn around the attitudes of students, employees, and the community include selection of our school board by the U.S. Dept. of Education as one of the 17 most exemplary out of 16,000 districts in the country; identification of our superintendent by the American Association of School Administrators to receive its coveted "Leadership for Learning" award; the Danforth Foundation's recognition of Jacksonville as a model urban school district for the nation; having four of the state's 13 national model schools; and the development of a comprehensive parental involvement program that has resulted in more than 100,000 adults attending back-to-school open houses each of the past three years.

Wendell P. Holmes, Jr., speaking on "The Best School District PR Program that Money Can't Buy," 1985 NSBA Convention, Anaheim, CA.

ble address public concerns. Remember, refashioning public perceptions is a slow process, largely because citizens are not watching you as closely as you think. One newspaper story will not be enough. Plan to repeat the theme as often and in as many ways as possible.

In sum, know how the public regards the schools before asking the community to support higher taxes. If there are problems, try to solve them. If there are schisms among board, staff, and faculty members, try to heal them. People like winners: Make sure you are one before launching a school campaign.

Step #2: School System Communication

School systems vary greatly in their characteristics. Some districts have only one or two schools, others tens—even hundreds—of schools. Each school system also functions within a social and political environment having a distinct power structure. Various formal and informal groups wield clout over citizen views and actions. The level of citizen participation in public decisionmaking varies as well. For the purpose of winning school elections, the significant differences among school systems stem from the patterns of personal communication and the distribution of political power within the community.

COMMUNICATION PATTERNS

- *In suburbs* the personal (face-to-face) communication tends to be weaker than in rural districts. Relying on radio, television, and newspapers from adjacent urban areas, the suburban household has few sources of in-depth information about its own community. Sometimes suburban news appears in a weekly newspaper which residents might not receive, much less read.

Many suburban residents are relatively transient and do not make deep or lasting commitments to their area's public institutions. However, these voters do tend to support education because as a group they have higher than average educational status. A suburban district provides the ideal setting for a get-out-the-YES-vote campaign.

Many suburban school systems experience periods of rapid growth that exert pressure on school facilities (forcing frequent bond referenda). Although the flow of new residents causes dramatic changes in voting patterns, parents of preschool or elementary-age children are usually one of the strongest groups of YES voters.

- *Small to medium-sized cities* generally have their own daily newspapers, radio stations, and even a television station. Because these residents tend to be more permanent than their counterparts in the suburbs, community ties and formal and informal lines of communication are stronger. The get-out-the-YES-vote is the most appropriate strategy for small to medium cities. But plan on committing more resources to media publicity and on taking a more selective approach to canvassing and other activities.
- *Citizens in rural areas* typically depend on a weekly newspaper and perhaps a local radio station for their formal lines of communication. Informal information exchanges among individuals are important in this setting. A few persons exert considerable influence on community opinion. Similarly, a small number of clubs or organizations are centers of social and business activity. All these should be considered as communication centers during the school campaign.

The schools themselves often serve this function. In fact, the network of parent/teacher groups and school organizations is ready-



Citizens, by a process of trial and error, come to rely on a particular set of sources of information.

For instance, we learned that parents' primary source of information about the schools is their children; their secondary sources are newspapers and television.

Michael Krop, "How America's Billion-Dollar School Board Is Gearing Up for Growth," *The American School Board Journal*, (Feb. 1989), p.22.

Certain issues (e.g., sex education, desegregation, and district boundary disputes) seem to have the greatest potential for eliciting response from individuals and coverage by the news media, and for increasing the community's level of concern over and awareness of the schools.

As informal and formal communication networks begin to carry more "news" about the issue, borderline individuals—those who hold negative opinions and attitudes toward the schools but normally do not vote them—may receive enough reinforcement to prompt action (in this case, a negative vote).

Philip K. Piele and John Stuart Hall, *Budgets, Bonds, and Ballots*, (Lexington, MA: Lexington Books, 1973), p.79.



Sources of free information include mass media, government agencies, special interest groups, and fellow citizens with special interests.

Michael Krop, "How America's Billion-Dollar School Board Is Gearing Up for Growth," *The American School Board Journal*, (Feb. 1989), p.22.

School people also need detailed knowledge of the communications network and all the organizations, both formal and informal—the sub-systems of the community political system. Channels are required for effective communication to the influentials and the organizations, in the parlance of political science, "access."

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.89.

made for volunteer recruitment. If a significant portion of these groups is hostile to the schools, you might have no alternative but to conduct a community crusade campaign. (See Chapter 8.) Without the support of school groups—and their armies of potential volunteers—the campaign will have a difficult time finding enough supporters among other segments of the community.

- *Densely populated urban areas* present special communications problems by having one or more daily newspapers and even radio and television stations that contribute to the local school coverage. Neighborhood weekly newspapers might serve targeted portions of the city. This type of media environment makes it difficult for school groups to obtain free air time or newspaper space to convey a message to voters. Paid advertising can be prohibitively expensive.

Communicating with urban voters, therefore, requires special efforts. Consider forming separate campaign subcommittees to communicate with each ethnic or neighborhood group. If the school system offers adult education classes, recreation, preschool, or day care programs, try communicating through these channels. Adults enrolled in such programs also could be tapped for campaign work.

Regardless of the school election setting, apply the political lessons discussed in Part II, Chapter 3. Remember the two-edged sword of school campaigns: identify supporters and urge them to vote. Before launching the campaign, make sure you understand the local patterns of communication. How much communication occurs from the top down (from influentials to citizens) and from the bottom up (from citizens to political and community leaders)? Who are the key communicators? How fast is the communication process? How much communication occurs among groups and between groups and their respective leaders?

Then, on the basis of this information, develop an efficient and effective system of communication with school supporters. It is essential to identify and communicate with potential YES voters during the election phase: without them the school cause is all but lost.

"Operative channels of communication," write Nunnery and Kimbrough, "provide invaluable means for convincing influentials and citizens in school election campaigns and for providing significant feedback concerning community reception to the schools." (*Politics, Power, Polls, and Schools Elections*, p. 14.)

DISTRIBUTION OF POLITICAL POWER

In general, communities can be classified as having either open or closed political systems. (The following discussion is based on the categories described by Nunnery and Kimbrough, *Politics, Power, Polls, and School Elections*, pp. 7-38.) Advise Nunnery and Kimbrough:

It is most important that school leaders understand how the dynamics of behavior affect the total power structure; how

the system may be influenced through political activity; and how to predict accurately the consequences of alternative strategies for school elections. This understanding can be achieved only by studying the power structure of the particular school district. (p. 14.)

Except in communities undergoing a radical change in their governance systems, citizens don't react to campaign information and strategies as independent individuals waiting to hear all sides of the issue and then ready to make up their minds based on the facts. Rather they take their voting and participation cues from the groups or influentials with whom they identify.

However, in disorganized communities with no set power structure, the school system itself has the opportunity to establish the reference points and communication links for a significant number of citizens. In such an environment, search out potential community and political leaders who are supportive of schools; offer encouragement and try to give them the where-with-all to achieve positions of influence.

In other communities, whether the system is relatively open or closed, influential persons exert significant power over most elections compared to the average citizen. Obtaining (or failing to obtain) the support of these individuals often sets the tone for the school election campaign.

- *Closed systems* often have stable populations and little economic development. A single group of leaders (representing different occupational areas) or a few groups of leaders (who share similar political and social views) exercise enormous influence on public opinion and policy. Public forums notably lack controversy. The level of citizen involvement in public life is low. In closed communities, school advocates will find it difficult to win a referendum without having the support of the influentials. The best advice is to incorporate their views into the planning process. If this group happens to be hostile to school needs, however, two options exist. Try to defeat this group politically at the polls or conduct an all-out, intensive grassroots referendum campaign and try to sidestep their power.
- In *open systems* various and frequently changing groups vie for positions of social and political influence. Average citizens are more involved (than in closed systems) in public life. New leaders and groups appear as community views on quality of life issues fluctuate.

The open community boasts a greater number of influentials than in closed systems; but their influence tends to be issue-specific. For instance, the influentials to be contacted regarding a curriculum referendum would be different than for a construction bond election.



Historical circumstances largely explain the distinct pattern evident in the geographic distribution of levy referenda. New England has few independent school districts and no tax levy elections; school budgets and taxes have always been voted at town or school meetings or by city councils and town boards. New York and New Jersey have school districts, but the school meeting tradition has been retained by annual budget elections in the districts outside the large cities. West of the Appalachians, whether or not a state has fiscal referenda depends on whether an antiproperty tax movement ever developed sufficient strength to write tax rate limits into the state constitution or statutes.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.3.



The goal of school PR is to generate community support. . . . All communities have resources that will benefit students: volunteers, scholarships, on-the-job learning opportunities, more supportive parents. But no community will give its all unless it supports what is happening in the school building.

Lew Armistead, "A Four-Step Process for School Public Relations," *NASSP Bulletin*, (Jan. 1989), p.6.

Although many communities in the United States are quite different from each other, demographic statistics show that throughout the country, both the elderly and non-parent population segments are growing. That is just one reason why it is vital to a campaign's success to identify and communicate with the YES voters.

Jeannie M. Henry, "Help for Passing Bond Referenda," *School Business Affairs*, (Dec. 1987), p.27.

Traditional grassroots school campaigns are the rule in open systems. Still, the support of the issue-specific influentials is necessary to better the chances for election success.

Citizens are responsive to a variety of information campaigns. In some communities, the political environment is divisive as groups and leaders aggressively compete for influence. In this case, educators should encourage compromise among the groups in terms of their support of the school referendum. Never let the schools become the object of the power struggle or take sides in a contentious political climate. Much of this consensus building will occur during the planning and scheduling of the ballot.

Remember to adapt campaign strategies to the realities of your political and social environment. "Too many school officials," write Nunnery and Kimbrough, "use standard procedures in running election campaigns regardless of the nature of the power structure in their school districts. This is a futile business and has resulted in many needlessly defeated school proposals." (*Politics, Power, Polls, and School Elections*, p. 23)

Step #3: A Two-Pronged Campaign: Education Phase/Election Phase

EDUCATION PHASE

An effective plan with well-defined objectives and an appropriate timetable is crucial to the education phase of the campaign. This phase occurs well in advance of the board's official decision to hold a school election.

Plan the education phase in a manner similar to a teacher preparing a classroom lesson. In this case the students are the voters. Just as a teacher doesn't present an entire unit during one sitting, don't try to cram too much information down the voters' throats. Your "class" already has many distractions, such as earning a living. Your "students" won't pay as close attention as you might like. In a classroom setting a teacher repeats important points for the sake of emphasis. Your "class" of voters needs even *more* repetition. Strive to find several novel ways to convey the same information so the message is heard and remembered.

TRANSITION

Do not schedule a referendum until the better informed voters understand the reasons for the school ballot. A hurried entrance into the election phase courts disaster. A pell-mell approach also raises questions such as, "Why didn't the superintendent (or board) anticipate the problems and plan ahead?" "Is he/she incompetent?" and "Can we trust the board to handle school affairs responsibly in the future?"

ELECTION PHASE

School elections are classified as either a targeted YES vote or a community crusade campaign. For most communities the plan of choice is to **TARGET THE YES VOTE**. A community crusade, a campaign having an extra endorsement phase, is recommended only in limited circumstances. No matter which type is chosen, all parts of the plan should conform to the basic strategy.

The purpose of the election phase is to communicate with YES voters and to get them to the polls. Although many of the same strategies are found in each campaign, the emphasis is different. For instance, door-to-door campaigning (a key element in YES vote recruitment) plays a smaller role in a community crusade. Before settling on a plan, identify and calculate the number of prospective YES and NO votes in the community.



The activities that precede a campaign are likely to have more influence on election results than the overt campaigning. . . . What are the devices and strategies for building community support for schools, for preparing the way for a levy or bond proposal, and for fashioning a specific ballot proposition?

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.87.

Color slides can effectively show critical school building needs which are hard to describe. These include school campuses filled with portable classrooms, classes meeting in different sections of an auditorium, leaky roofs, and substandard buildings.

Focus, South Carolina School Boards Assoc., (November 1988), p.2.

Most bond elections and some levy proposals require careful and extensive planning and preparation over a period of one or two years or longer. Cautious school officials will develop the proposal carefully, study previous election results, assess the opinions of community influential, perhaps conduct a community opinion poll, examine the following of school leaders, select the election date carefully, and insure that all legal requirements are met.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.94.



Voters in school financial elections are more likely to be parents, property owners, middle-aged voters, and interested in schools than are the persons who do not vote.

Philip K. Piele and John Stuart Hall, *Budgets, Bonds, and Ballots*, (Lexington, MA: Lexington Books, 1973), p.46.

Those surveyed also reported that "selling" the budget to the public each year consumes the time and energy of board members and administrators which might be better spend on developing programs, improving instruction, and shaping curriculum.

Jeremy Cato, "Raw Democracy Destabilizes Education," *Education Leader*, (Aug. 12, 1988), p.13.

A majority of the studies available find there is no significant relationship between school district size and election outcome.

Philip K. Piele and John Stuart Hall, *Budgets, Bonds, and Ballots*, (Lexington, MA: Lexington Books, 1973), p.75.

Step #4: Identify The YES Vote

Exhibits C and D provide examples of how to tabulate the potential YES and NO votes in your community. While neither method can project the exact election results, both are valuable as planning resources.

TABULATE THE YES VOTE

- Add the number of people having a direct connection to the school district. Include board members, teachers, and staff members.
- Record this number and multiply by two. This calculation assumes each person will influence one additional vote besides his or her own (e.g., a spouse, relative, or friend).
- Record the school system's enrollment and multiply by one and a half to determine the YES vote contribution expected from parents. The size of the multiplier reflects the fact of families with one parent and others with more than one school-aged child.
- Identify the district organizations with memberships that traditionally support the schools. These might include organizations that don't formally endorse referenda, but whose membership includes school advocates. Examples abound such as the League of Women Voters, American Association of University Women, and other similar groups. List all such organizations and estimate the size of their memberships, but only if you can count on their continued support.
- Multiply the membership figures by one and a half to account for the additional YES votes influenced by the members. Add these figures to get a first glimpse of the potential YES vote. Obviously this number is only an approximation, but it probably isn't far off the final mark—assuming you work hard during the campaign.

NEXT, TABULATE THE PROSPECTIVE NO VOTE

- Review the results of the most recent election. Record the number of NO votes cast. If there has been more than one election during the past ten years, then consider the election with the largest number of NO votes cast. Even if "extenuating circumstances" (e.g., a fractious board, unfavorable publicity, or an unusually large tax increase) influenced the outcome, preparing for a worst-case scenario increases your chance for success this time around!
- If some organizations expected to oppose the ballot were not organized at the time of the last election, place their membership totals on the chart, multiply by ten, and add this number to the NO votes cast in the last referendum. This calculation provides the number of NO votes projected for this election.

Using a multiplier of ten may seem excessive, but it is realistic. *Organized opposition always exerts an influence far out of proportion to its numbers.* After all, arguing against a position is easier than advocating it, especially when the proposal requires public

EXHIBIT C

TABULATION OF POTENTIAL YES VOTE

WORKSHEET

	Number	Multiplier	Potential YES Vote
Board, faculty and staff	_____	x 2	= _____
Enrollment of school system	_____	x 1½	= _____
List other groups or organizations <i>strongly</i> supportive of your schools (record number of members).	_____	x 1½	= _____
	_____	x 1½	= _____
TOTAL POTENTIAL YES VOTE			= _____

EXHIBIT D

TABULATION OF POTENTIAL NO VOTE

WORKSHEET

	Number	Multiplier	Potential NO Vote
List the number of NO votes cast in the last referendum (if there has been more than one election, then list the largest NO vote cast.	_____	x 1	= _____
If organized opposition has developed since the last referen- dum, then estimate the membership of the groups.	_____	x 10	= _____
	_____	x 10	= _____
TOTAL POTENTIAL NO VOTE			= _____



Measuring the extent and nature of conflict within a community at any given time is not an easy task. Two indicators of community conflict over school election proposals are the amount of individual criticism of the schools and the amount of organized group opposition to the election proposal. Both variables have been found positively associated with voter turnout in school financial elections.

Philip K. Piele and John Stuart Hall,
Budgets, Bonds, and Ballots, (Lexington,
MA: D.C. Heath and Co., 1973), p.63.

money. Most voters prefer lower rather than higher taxes. It's an uphill battle to persuade citizens to spend more money on schools.

- Compare the two worksheets. Probably the number of NO votes far exceeds the YES votes. This helps to explain why many referenda fail to pass. If the comparison of worksheets shows a majority of NO voters, then find additional YES votes and plan a campaign to get them to the polls.

In the unlikely event that your worksheets indicate a majority of YES votes, count yourself fortunate. But proceed with your planning and conduct an effective campaign so that no ground is lost. You might not have to work as hard as others to identify your supporters, but you have a job to do nonetheless.

Step #5: Concentrate on the YES Vote

Generally you waste time and effort by trying to convert NO to YES votes. First, you don't have enough time. More importantly, many of these NO voters have beliefs that are invulnerable to education or persuasion. In many cases the convictions have nothing to do with the schools, much less with the election itself. Although the conversion of a NO vote might give you a great sense of satisfaction, it's a poor way to spend limited campaign resources. Some NO voters might be "soft" and more easily won over, but they will be convinced anyway during a positive, well-conducted YES vote campaign.

Where can additional YES votes be found? First, look among the well-educated and prosperous. In other words, persons usually attribute their achievements and successes at least in part to education. Also identify families having high expectations for their children. YES votes can be found in many places. One easy way is to look for the names of professionals or trade groups in the yellow pages of the telephone book under their occupational categories.

Also look for ways to locate other well-educated persons in less obvious careers. For example, in rural communities obtain a copy of the local Farm Bureau membership list to identify farmers who attended college. However, in many areas of the country farm groups are active opponents of increased funding requests for the schools. So proceed cautiously with these groups.

Ask your colleagues for the names of other organizations and then retrieve the membership lists. Generally, people who were successful in school will support school funding requests. If these groups are reluctant to support the school ballot, it may indicate deep-seated problems with the school system or with the ballot proposal itself.

Identifying potential YES voters is the most critical step in the planning process. Involve as many people as necessary to insure that no major groups are overlooked. Be as creative as possible in finding ways to locate potential supporters. The success of the entire campaign depends on how well this is done.

After calculating the potential YES vote, write the number on your worksheet, multiply by two, and add the total to the number of YES votes already tabulated. This should raise the total YES votes to more than the total NO votes. If this does not occur, you might not have worked hard enough to identify school supporters. Repeat the process, perhaps by asking other people to help you identify more YES voters.

Of course, many of the same people you now are counting on for support might have cast NO votes in the last election. If this is so, have circumstances changed enough to place them in the YES column? Any lingering doubts? Then try interviewing some of these individuals to pinpoint their views. Do this before launching the campaign.

If your worksheet shows enough YES voters to form the basis of a successful campaign, choose an election date and make the decision official. Next on the schedule: communicate with as many YES voters on as personal a basis as possible.



C. Montgomery Johnson and Virginia Clockain's "Seven Solid Rules of Thumb" (School Bond Issues: Pass-Fail) to guide the search for YES voters:

- *The higher the person's level of educational attainment, the greater the level of school support.*
- *Considered by occupation, business and professional persons consistently turn out the highest proportion of their numbers in elections and also consistently provide the highest percent favorable school support of any occupational groupings.*
- *Unless reasons can be specifically tailored to overcome their tax concerns, the occupational groups which consistently produce the highest percent of negative vote in special school elections are retired persons (the elderly) and farmers.*
- *The higher the family income, the more likely those eligible to vote actually vote and the higher the percent favorable vote cast for schools.*
- *The younger the adult, the less likely he or she is registered, the less likely he or she will actually vote.*
- *Parents of school-age children are consistently better supporters of school levy and bond campaigns than adults without children in school.*
- *Women turn out better than men in local special school district elections and consistently deliver a higher percent more favorable vote than men voters.*

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1977), p.41.



The Colorado Association of School Boards supports... [legislation to] allow school district mill levy increase elections on at least an annual basis on general election day as well as on selected alternative dates. The association also supports any effort to study and reconcile the election laws so that public entities can cooperate when conducting elections on the same day.

Rationale: There are significant problems to address when public entities with non-current boundaries are conducting elections on the same date. There also are technical differences in the elections laws governing local, county, and school elections as well as state elections which present significant obstacles when trying to conduct a school election in conjunction with the general election.

The Colorado School Board Bulletin, (Nov. 1988), p.6.

Generally, autumn is the ideal season. During the summer, many community residents are vacationing and during the spring, taxes are due.

Jeannie M. Henry, "Help for Passing Bond Referenda," School Business Affairs, (Dec. 1987), p.26.

Plan carefully the board meeting to discuss the referendum resolution. Some voters make a decision on their vote after reading the first announcement.... Keep information child-centered.... Provide the tax information voters want to hear.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.6 (preface).

Step # 6: Schedule the Referendum

Some school boards have little latitude in selecting the election date. States with consolidated election laws limit the choice to certain days. If you're unaware of your options, seek the advice of the school system's legal counsel or the local election commissioner. If there are no calendar restrictions, then choose the first or second Saturday in December. Although certain social, traditional, or cultural reasons could make this a poor selection, historically school ballots have been most successful during the period from mid-October to mid-December.

Successful referenda are possible at any time, for example, in February or March. But make sure that the month is generally appropriate to the subject of the ballot request. Don't ask voters to approve funding for air-conditioning in February! Another consideration is extremely important. Certain times of the year should be avoided if at all possible. Don't schedule an election in the month when property tax bills are mailed or near their due date. Late June, July, August, and early September also are poor times because many potential volunteers will be on vacation.

Saturday is usually the best day of the week for a school election. The fact that fewer people work on Saturday makes get-out-the-vote activities easier. On weekdays the majority of votes are cast early, before work; and late, after work. Although it is possible to identify the probable YES voters who have not yet cast their ballots and remind them to vote, the process is difficult because of work schedules. The result: many YES votes are lost. Consider the cultural and demographic patterns in your community and then schedule the election for a season and day that allows your volunteers to recruit the most YES votes for schools.

Try not to conduct a school referendum simultaneously with another election. This makes sense if you remember the winning strategy: identify your YES voters and get them to the polls. In a general election every candidate will pursue the same strategy. Since other candidates' YES votes might not support the school ballot, you lose control of the situation. Also, schools will have to compete with candidates in a general election to get their message to voters. Expect to have your request for a special election possibly challenged by taxpayers' groups on the basis of the extra cost. In states with consolidated election laws, school officials might have to schedule a school referendum alongside a general election. In this case, choose the election that historically has the lowest voter turnout. This could sound confusing. Remember the goal is to increase the turnout of school supporters—YES votes—not all voters (YES and NO votes). School supporters are more easily mobilized during elections traditionally having a lower general voter turnout.

If the election is a partisan one, great care should be taken to avoid having the referendum become a partisan issue. The typical candidate for office will keep his or her distance from a ballot with a financial request. Occasionally an underdog candidate might sense the referendum is a losing cause and will risk alienating school supporters by taking

an aggressive stance—especially if the opponent is considered “pro-education.”

If the school election must occur in an emotionally charged partisan atmosphere, then run a separate school campaign to the extent possible and treat all candidates with an even hand. However exceptions exist. If a popular incumbent is running unopposed, seek an endorsement. More important than the endorsement is the candidate’s willingness to let political volunteers distribute school literature and conduct canvassing activities. In general, however, avoid partisan entanglements.

At times a referendum must be scheduled simultaneously with the election of school board members. Board members will try to avoid this because incumbents running for re-election would rather not on the same ballot with a tax levy or long-term debt request. However, a well-planned, well-executed get-out-the-vote campaign can benefit incumbents.

States with consolidated election laws also might limit the number and location of voting places. Such restrictions affect the structure of your campaign organization. For example, in states where school boards can conduct their own elections, polling places usually are located in school buildings. In this situation, voting precincts correspond to school attendance areas, thus facilitating get-out-the-vote efforts.

If another political body determines the voting areas, there might be little relationship between school attendance boundaries and voting precincts. Election day get-out-the-vote activities are more difficult to organize. In this case, the get-out-the-vote organization cannot take advantage of the familiar school network.

WHAT TYPE OF BALLOT?

School systems sometimes propose more than one issue to the voters or divide a school construction referendum into multiple requests. For example, a growing school system might request both money to construct a new school and a tax rate increase to pay the salaries of the teachers needed to staff the buildings.

If two different types of school requests appear on the ballot, search for a unifying theme such as growth. Then campaigners have a single message to convey to voters, in this case, the school system is growing and requires more classrooms and teachers. Communicating a growth message usually is easy because voters are aware of the new housing subdivisions and the crowded roads. A two-ballot format, then, does not create great difficulty for school supporters.

Consider a different example. Instead of lumping together \$100 million of school construction and renovation needs and risking defeat, the school board separates the requests into two ballots, one for the elementary schools and one for the secondary schools. Some political sages favor giving voters a choice among projects if the total financial request is unusually large. This type of approach might convince some citizens who otherwise would vote against the same projects if they



A common belief among veteran local officials is that a coincidence of several expenditure proposals may imperil all of them; and in some communities officials engage in consultation and clearance arrangements to avoid “bunching.” Is this just folklore? Not entirely.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.61.

The school proposal was structured, officials said, to win the widest possible support by balancing new school construction in the rapidly growing western part of the county with the renewal, or major renovation, of older schools in the east.

“It’s geographically balanced, and it’s balanced between [new facilities needed because of] growth and upgrading the older facilities,” said Fairfax County (VA) School Board member Kohann H. Whitney. John Ward Anderson, “Bond Proposals No Longer Shoo-Ins in Fairfax as Residents Question Planning,” *Washington Post*, (Oct. 31, 1988).

Meet with the bonding attorney and make sure the ballot is written as clearly as possible. Make sure the bonding attorney has enough time to meet all the legal requirements necessary for a referendum. Most attorneys need at least 90 days prior to the vote to complete their work. *Referendum Kit*, (South Carolina School Boards Assoc., 1988), p.6 (preface).



Repeat elections appear to be a bargaining process. For example... one district's budget was defeated badly in May and again in July. The board then pared its request by 2%, but that was defeated by the same overwhelming margin. For the fourth effort, the board trimmed another 1.6 %, which also lost, although not so badly. Apparently the board regarded the third figure as rock bottom; it proposed the same amount for the fifth election. The budget carried by a comfortable margin, as the crisis and no doubt a vigorous campaign drew a record turnout. The statistics show clearly that the decisive factor was turnout, but surely the calendar and fatigue also were significant factors.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.62.

The design of a bond proposition is crucial to its success, and more important than the subsequent campaign propaganda.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.122.

The external marketing of our campaign was designed to reach as many potential positive voters as possible. Several issues were scheduled to appear on the November ballot.... Our committee encouraged all three groups to meet together and to develop strategies to cooperatively bring out the positive voters. The results of that cooperative effort were rewarding as all three issues passed.

Timothy G. Nusbaum, speaking on "The Use of Internal and External Marketing To Turn Critics into Fans," 1987 NSBA Convention, San Francisco, CA.

appeared on a single ballot. However, multiple-ballot referenda always run the risk of encouraging voters to split their ticket by voting for some projects and against others. If the referendum contains multiple ballots, campaign as if there was only one request.

Don't ask the voters to approve multiple referenda unless it is absolutely necessary. A multiple-ballot election makes it more difficult for campaigners to communicate a simple clear message to voters. Citizens will not give you much of their time and attention because of competing priorities. Multiple ballots allow voters to cast a YES ballot on one question and a NO vote on the other and then justify the split vote as a way of saying the total cost was too high.

Some school boards and administrators might be tempted to inflate the amount of the funding request and then plan on having more than one election. After a defeat at the polls, the subsequent ballot request would be lowered in the hope of persuading voters they were getting a bargain. Avoid this strategy. It is short-sighted because the tactic undermines the credibility of school leaders in the community. It is hard to marshal campaign workers and motivate the ones you recruit after a defeat. Another result is voter cynicism.

Ask citizens only for what the schools need, one ballot per election if possible, and then work hard to develop an effective campaign plan.

Step #7: Plan The Campaign

A successful campaign plan depends on a thorough knowledge of your school system and community. Assess citizen views as well as the political environment in your community. Gather together the key individuals in the campaign organization as well as a group of representative citizens expected to support the ballot. Digest the available information. Thrash about strategy ideas. The participation of these individuals in the development of the campaign plan is crucial to assuring that those implementing the plan have "bought into it" and that the plan represents a broad base of school supporters. If a "needs package" or "facility assessment report" prompted the referendum, citizen participation in the study is crucial to determine what voters are willing to support. Let this information and planning process provide the basis of the campaign document. Prepare responses to questions such as:

- What areas in the community have the greatest number of persons tending to vote in school elections?
- What is the community's track record on passing school referenda?
- What side issues might surface during the campaign?
- How many locations are designated as voting places? Where are they?
- How do citizens qualify to vote in school elections?
- What laws govern poll watchers?

Don't skimp on time and effort when developing the campaign plan. Remember that most referenda are lost because:

- There is no plan.
- The plan is changed continually.
- More than one person is responsible for implementing the plan.

Actually all three reasons boil down to one: There is no consistent campaign strategy. If, for example, the plan intends to target YES voters, you could work at cross purposes and waste valuable time by committing extensive campaign resources to a speakers' bureau and sending volunteers or staff to every possible community group or organization meeting.

After developing the plan, designate a person having enough authority (and perseverance) to see it through to completion. The person in charge must be able to resist efforts to change tactics in response to the daily crises that arise in the heat of a campaign.

Appointing a citizen coordinator/manager is necessary to promote the legitimacy of the ballot. The official assignment of a staff member to head the campaign invites criticism that the referendum lacks community support. Consider another advantage of lay leadership: the press and the public will not expect the detailed and precise responses to questions that they would otherwise demand from staff. Similarly, parents or citizens harboring complaints about matters unrelated to



What contributed to this overwhelming win? Beaufort County (SC) Schools Superintendent Terry Terril pointed to several factors, including the school board's role in encouraging community leadership. For a nine-month period, a county-wide citizen task force studied each school's projected growth and building needs. It then published a comprehensive report distributed throughout the district.

The referendum called for a phase-in of the sale of bonds to minimize the impact on taxpayers. Extensive endorsements came from all sections of the community including the district's numerous school-business partners. A small vocal group of opponents also surfaced.

"We focused on nonpartisan, community needs and tried to keep party politics out of this campaign," said Dr. Terril. "We even had support from senior citizens who recognized how the condition of our schools directly reflected on our community quality of life."

Focus, South Carolina School Boards Assoc., (June 6, 1988), p.1.

Finally, your announcement must emphasize education and students, not finances and taxes. Certainly, financial data is important and must be included, but people weighing a YES vote are more interested in what the added money will mean in the terms of educational excellence than they are in hard data.

Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1977), p.48.



Communicating with the voters may require a formidable organization. A public relations veteran with experience in school elections advises that the campaign be built around a citizens committee, whose chairman is not a school person, not even a board member.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.104.

Anthony T. Lane, Fairfax County School Board Chairman, has announced that former School Board Chairman William B. Wrench will chair the citizens committee for the Nov. 8 school bond referendum. Vice chairmen will be Cathy Belter, member of the National PTA Board of Directors, and Kevin Bell, immediate past president of the Fairfax County Council of PTAs.

For Your Information, Fairfax County (VA) Schools, (Aug. 19, 1988).

It's good politics to create citizens committees to assist the administration and the board when attempting a bond election or the process of allocating adequate funds for the support of our schools. Painful history tells us that many bond ballots have been defeated because the board did not work with other political entities in the community thereby disregarding the community power structure.

Robert Haderlein, speaking on "How To Use Good Politics in School Board Service," 1985 NSBA Convention, Anaheim, CA.

the referendum will be less tempted to voice the criticisms in public forums. However, if an administrator is the spokesperson, expect to have past grievances (e.g., boundaries, grading scales, and transportation) raised anew.

Finding a citizen coordinator often is one of the highest hurdles in the campaign. With an increasing number of mothers staying with or returning to careers, fewer persons have the time to devote to a school campaign. Board members always should be on the lookout for capable and willing persons. Be sure to get names, addresses, telephone numbers, and as much other relevant information as possible. Each board member should maintain a file of potential candidates even if your school system does not foresee a referendum in the near future. When a ballot is necessary, board members will have a ready set of names to sort through and prioritize. Then the right individual can be recruited. Without such a resource, difficulty in finding a coordinator can launch the campaign on a sour and tardy (and ultimately defeatist) note.

Select a coordinator who is familiar with the schools and community and who has personal contacts to draw on for human and capital resources. Organizational ability, speaking and writing skills, and tact also are important attributes of a successful leader. But far and away the most important qualification is TIME. If the person has a full-time job, inquire about the flexibility of the working hours, personal leave allotments, and other social, job, or family commitments that might interfere with the campaign. Be honest about the effort involved. It's always considered a serious setback to switch coordinators during a campaign.

Select a school staff person to serve in a secondary, liaison role in the campaign organization. This assignment will add a considerable burden to the administrator's responsibilities, so adjust his or her workload.

The staff member should have the superintendent's full trust, confidence, and support—as well as a direct line of access to the office for advice in critical situations. Without the school chief's full and enthusiastic support the referendum will face an uphill struggle during the campaign.

Step #8: Campaign Leadership

BOARD MEMBERS

The campaign plan needs more than the school board's endorsement: it needs the active support of all board members. Each elected (or appointed) board member has a following in the community and most often is well positioned to recruit large numbers of volunteers. In fact, many board members have resources tantamount to a political organization. These contacts should be used to the maximum extent possible. The type of participation chosen by board members depends on the amount of time and energy they are willing and able to contribute. However, board members who don't contribute a lot of time must still be highly visible in the campaign.

All board members should attend the press conference announcing the referendum. Schedule the announcement at a time convenient for board members, perhaps prior to a regular board meeting.

Some board members should publicize the campaign by going door-to-door in neighborhoods. The superintendent should do the same. This effort will go a long way in convincing people on the serious need for the ballot request. You might want to alert local newspapers and/or television stations in hopes of obtaining coverage of the event.

SUPERINTENDENT

Although campaign coordinators are responsible for many campaign decisions and the management of day-to-day operations, in many cases the superintendent directs the overall effort and takes responsibility for crucial decisions. Final staff responsibility for the campaign often is best placed with the school chief.

Volunteer recruitment is difficult if citizens doubt that the referendum is the superintendent's top priority. In the public's eye, the superintendent is the symbol of the school system. Think of the superintendent as a candidate in a political campaign. Then consider trying to conduct an election with an absentee candidate.

Involving the superintendent ensures that the person who best understands the campaign plan has the authority to implement it. A call to the school principal from the superintendent asking for a list of 20 campaign volunteers carries more weight than the same request coming from an administrative assistant or a curriculum director. The superintendent can effectively supervise the work of other staff members and can resist those who would scrap the plan during moments of crisis.

When conducting door-to-door canvassing or other activities, record the names and telephone numbers of individuals having unanswered questions about campaign issues. Then have the superintendent or his or her qualified designee make the follow-up phone calls. Often such quick personal attention from a top administrator wins a new ally for the schools.



Tax bond issues compel school people to be politicians, in fact on a larger scale than most local politicians. Supposedly aloof from "politics," the school superintendent actually is the biggest politician of many communities.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.87.

As the chief executive officer of a school system, the superintendent attempts to respond to and influence both the board of education and the public. Although superintendents are normally deeply involved in school elections, the evidence concerning their actual impact on election outcomes is inconclusive.

Philip K. Piele and John Stuart Hall, *Budgets, Bonds, and Ballots*, (Lexington, MA: Lexington Books, 1973), p.75.



Instead, a finance issue is often poorly worded on the ballot and written in such a way to cause maximum confusion. So, it's up to the organizers of the referendum to make the issue come alive....

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.1 (preface).

School public relations is an investment. The result is better education opportunities for students and the quality of the results depends on how much we put into the investment.

Lew Armistead, "A Four-Step Process for School Public Relations," *NASSP Bulletin*, (Jan. 1989), p.6.

ACTIVE INVOLVEMENT

Although excessive personal involvement on the part of the superintendent and board members can be risky, the experiences of thousands of school systems indicate that the active commitment of school leaders is necessary for success. But be on guard against letting school issues become personalized. An election about taxes or building renovations should never become a referendum on the competency of a school administration or the leadership of a school board. Convey the message that this election is so important to the schools that the superintendent and board members are working extraordinarily hard to ensure success.

Step #9: Combat The Opposition: Unorganized Opposition/Organized Opposition

UNORGANIZED OPPOSITION

Prepare for two types of opposition to the school ballot: unorganized and organized. Unorganized opposition consists of isolated individuals who are poised to resist all proposed tax increases. Although they represent a minority of the district's voters (usually less than ten percent) the opposition's numbers are magnified out of proportion because of the group's high level of voter turnout.

This type of constituency can exceed the average ten percent figure in a school election if school personnel are seen by the public as inadequate or if the board and administration are viewed as poor fiscal managers. Because perceptions frequently are based on impressions created over a long period of time, these views are difficult to change during a campaign.

But sometimes an unexpected campaign event can speed the transformation. If this occurs, a community relations or public information department must be prepared to capitalize on the event for as long as the favorable public response continues. Perhaps, for example, the quality of the academic program is a campaign issue. Two weeks before election day, school officials announce that three high school students were named National Merit Scholars—the most in the schools' history. Or perhaps the U.S. Secretary of Education designated a local school as the recipient of an "Excellence" award. Debate in another campaign focuses on the school budget. Several weeks before the election the state superintendent of education places the school system on a "fiscal watch" list. Each of these events should be used to strengthen the schools' position during the campaign.

This kind of effort requires the services of a full-time, year-round public relations (or community information) officer. Funding this position is well worth its budget allotment. An active community relations program establishes an attitude of caring and concern that enhances the schools' reputation and minimizes the amount of unorganized opposition in the community.

A wise investment for any school board, it's an indispensable one for schools depending on voter support for budgets or projecting the need for capital expenditures. Another plus in this area is for the board to adopt a public information policy that includes a plan outlining the responsibilities of school officials and the mechanisms for discharging the public relations functions.

Says Jeannie M. Henry, (director of board development, South Carolina School Boards Association) speaking at the 1989 NSBA Convention, "Boards that have a 12-month systematic two-way planned public relations system are way ahead of the game in terms of passing tax levies."

A school system without a community relations staff should set up a department well in advance of a school election. The referendum



What is the appropriate strategy for school people in dealing with the opposition? The usual advice of the pros is to ignore it.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.112.

Measuring the extent and nature of conflict within a community at any given time is not an easy task. Two indicators of community conflict over school election proposals are the amount of individual criticism of the schools and the amount of organized group opposition to the election proposal. Both variables have been found positively associated with voter turnout in school financial elections.

Philip K. Piele and John Stuart Hall, *Budgets, Bonds, and Ballots*, (Lexington, MA: Lexington Books, 1973), p.63.

Of course, the absence of a counter campaign does not mean that there is no opposition. School elections, except perhaps some renewal levies have the built-in opposition of a substantial number of persons with a preference for not paying property taxes.

Also, it surely is a rare community that does not have several persons with specific dissatisfactions about the schools, and several who object to some aspect of the project, such as the design or location of a proposed building.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.111.



Of course, strong, organized opposition can often deal death blows to a referendum campaign. While only 37% of successful campaigns [in a study conducted by South Carolina School Boards Assoc.] faced organized opposition, 100% of the losing districts contended with organized opponents.

Jeannie M. Henry, "Help for Passing Bond Referenda," *School Business Affairs*, (Dec. 1987), p.26.

When it comes time for educators to propose budget increases, the greatest resistance is sure to come from the community that has been lulled with happy "messages." The taxpayers will rightly ask: "If the schools are already so good, why do they need so much more money?"

William Thurman, speaking on "Tell It Like It Is," 1987 NSBA Convention, San Francisco, CA.

Threatening the elimination of successful and popular programs as a ploy to ward off reductions in proposed budgets is a discredited tactic, especially if, as is often the case, such program cuts do not come about.

William Goldstein, *Selling School Budgets in Hard Times*, (Bloomington, IN: Phi Delta Kappa, Fastback 215, 1984), p.11.

Community groups and leaders appear to have an important effect on the outcome of community controversies. In general, the greater a community's level of organized opposition, the more likely is defeat of school financial elections.

Philip K. Piele and John Stuart Hall, *Budgets, Bonds, and Ballots*, (Lexington, MA: D.C. Heath and Co., 1973), p.80.

planning session should include a report by the information officer on the effectiveness of the public relations program. The campaign strategies selected by the board should reflect the report's recommendations.

ORGANIZED OPPOSITION

Organized opposition generally takes the form of concerned taxpayers groups standing ready to oppose any increase in public expenditures. Their ready access to the press (who gives far greater weight to opposition views than their numbers deserve in an attempt to be "balanced") also contributes to the group's strength.

Frequently these groups succeed for exactly the same reasons that a two-pronged YES vote strategy works: a simple message is conveyed ("Do not increase taxes") and activists make sure the NO voters get to the polls.

With an in-place organization and concerns broader than education, taxpayers groups must not be ignored. Deal with them directly. Arrange a meeting with the leadership to ask for their support. If unsuccessful, then request neutrality. The most effective appeals rely on knowledge of the personalities involved. General reasons to support a ballot include the schools' positive impact on property values, on business growth, and on future generations.

If your best efforts fail, then you have no alternative but to race towards election victory with a better organization and a more successful voter turnout strategy.

Active opposition takes several forms. Instead of waging a public campaign against the ballot, opponents might concentrate on turning out the NO votes. Or you might see opponents express their views during public meetings, in letters to the editor, and on signs and placards. Public opposition significantly increases the odds against school success. It is easier for the average voter to pledge a NO vote than a YES vote. After all, by voting NO the voter saves tax dollars and does not have to expend the effort required to understand the issues.

When confronted with organized opposition, don't attack your opponents. React by out-organizing and out-working your adversaries. To secure NO votes, opponents will attack the credibility of school leaders and try to raise questions about the legitimacy of the ballot requests. Respond by issuing a simple factual campaign statement. Resist the temptation to predict dire consequences should voters reject the school ballot. This tactic usually backfires.

A successful campaign speaks the language of credibility. Base all campaign statements on the facts. Make arguments brief and to the point. If you don't, the messages could serve as convenient campaign targets for the opposition.

As difficult as it is to counteract organized opposition, it might be a lighter burden than having to overcome generalized opposition pervading an entire community.

Step #10: A Final (and Important) Step

No one likes a crybaby or whiner! Don't cast yourself or your board in this role — it's a losing one. The heroes and heroines in an election drama are not complainers but doers who diligently follow the game plan from start to finish.

By the way, if this advice is difficult for you or your board to accept, then scheduling a referendum might well be a chancy affair. It's essential that voters have confidence in the school board and administration. Some people always will blame the school system's problems on your own or your board's ineptness—with or without foundation. Therefore, make it a priority to develop strong citizen trust and confidence during the ensuing months (and years). In a real sense, just as any successful politician is campaigning continuously, all successful school administrators and board members always are preparing for the next election.



Why do you need a year-round public relations program? Because the public supports issues they understand...or think they understand. Without the understanding that communication generates, schools and school people do not get the backing they need to provide educational programs.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.1 (preface).

A public well-informed about the instructional program, its potential benefits for students, and its modest costs will be far more hospitable to productive public discourse about increased spending and resulting taxation than one that has had information withheld. In other words, masking, distorting, or perfuming the need for more dollars usually boomerangs in ways that are assuredly counterproductive.

William Goldstein, *Selling School Budgets in Hard Times*, (Bloomington, IN: Phi Delta Kappa, Fastback, 215, 1984), p.11.

CHAPTER 5

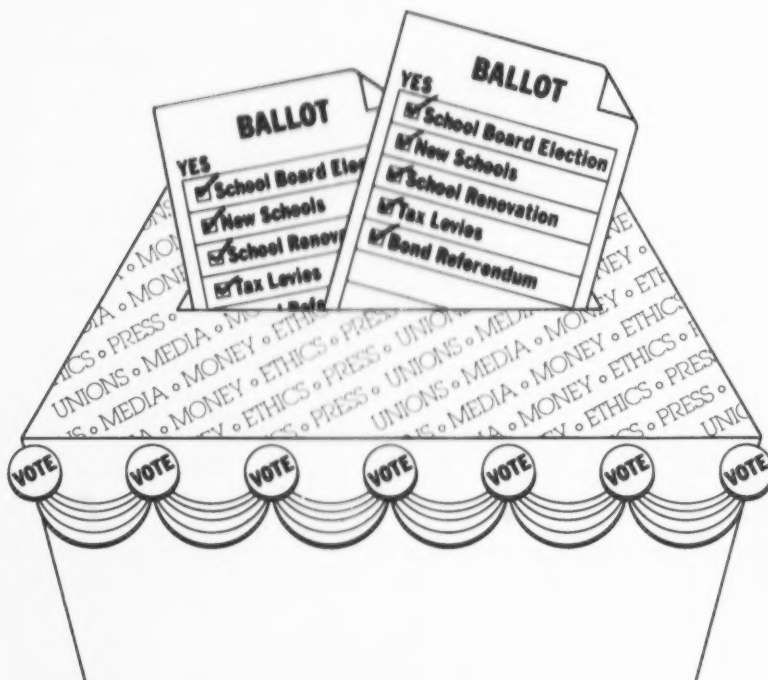
THE MESSAGE: WHAT TO SAY AND HOW TO SAY IT

INTRODUCTION

Many campaign promotions are tossed aside immediately; all are discarded eventually. Nonetheless, campaign brochures, leaflets, signs, posters, buttons, bumper stickers, placards, and sometimes imprinted nail files, pens, and mementos carry the schools' message to YES voters.

The knick-knack items are relatively expensive to produce and even counterproductive from a political standpoint when used in school campaigns. However, campaign literature—especially a brochure—is one of the few parts of an election that citizens can take home, read, think about, and reread. Moreover, publications have an immediate positive or negative impact on the voter.

Brochures, leaflets, and signs should be well written and attractively printed but also inexpensive. Bumper stickers, posters, and yard signs often are counterproductive in a YES vote campaign because they are directed to all voters, YES and NO alike. Carefully consider whether to spend significant amounts of campaign funds on these items in a YES vote campaign. Other paraphernalia such as pens, nail files, and buttons similarly serve little purpose.



One of the interesting aspects of school referenda is the rich variety of media used to disseminate the message. School children carry leaflets home; the school newspaper issues a parent's edition. The local newspaper carries a sudden flood of letters to the editor and display advertisements purchased by various groups. . . . In addition to radio and television spot announcements, there may be automobile bumper stickers, billboards, window cards, bus cards, and VOTE tags.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.108.

The general public is not constituted of accountants and has little tolerance for petty fiscal detail, even though a few will literally hunt for errors in order to discredit the whole budgetary process.

William Goldstein, *Selling School Budgets in Hard Times*, (Bloomington, IN: Phi Delta Kappa, Fastback 215, 1984), p.11.

As you develop a campaign message, ask yourself: Is this something an average person can understand? Is this targeted to address the questions of key audiences? Is this something that will make people leave home and drive to the polls so they can vote YES? The best way to answer these questions is to ask a sampling of people to review your literature before you print 20,000 copies.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.



A prominent characteristic of much of the literature is the quantity of argumentation, facts, and figures. Although campaign materials do add emotional appeals to the facts and logic, particularly in repeat elections, school people continue to defy the propaganda maxims of advertising and public relations. They cling to the assumptions that voters are thirsting for solid information and that voting decisions are made by ratiocination. The political pros would scoff at much of the literature as naive.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.106.

Remember: complexity leads to confusion; confusion leads to resentment and bitterness; and lingering bitterness makes losers of us all.

William Goldstein, *Selling School Budgets in Hard Times*, (Bloomington, IN: Phi Delta Kappa, Fastback 215, 1984), p.11.

Facts and logic, by themselves, rarely sell anything. If your campaign literature is a series of statistics and pie charts, you're headed for trouble. These materials have to be translated into language people can understand...and most people don't understand multi-million dollar school budgets.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.

THE BROCHURE

Your entire campaign can be waged with one piece of literature: an 8½ x 11 sheet that is folded once or twice. Make sure the brochure fits into a business-size envelope so that local companies that are willing can include the promotion in one of their mailings. If resources are available, two colors of ink enhance the attractiveness and allow the highlighting of portions of your message. This simple brochure is all you need to carry a brief and to-the-point message to voters.

Educators tend to explain school issues carefully and in some detail. An admirable characteristic in the classroom, the habit is deadly in a political campaign when you are trying to communicate with nonstudents who have other things to do. Remember, few people care as deeply about this referendum as the ones directly involved in the campaign. Keep the message short and direct so you will attract and keep the voter's attention. Make the best use of whatever time a person gives you. If people want additional information, they'll ask. Then offer a longer presentation. But never tread on the ground of boredom or detail if your objective is to recruit YES voters. Citizens have different levels of interest in school issues. Be flexible and willing to satisfy various information needs. But remember that most people will be more satisfied if your response errs on the side of brevity.

Two sample brochures from the same campaign (*Exhibits E and F*) illustrate contrasting styles of campaign promotion. *Exhibit E* displays a YES brochure prepared and distributed by the school organization to promote a school levy ballot. The school system's identity has been protected by deleting references to the name. Note the large areas of gray type. The brochure identifies the theme of the campaign, GET YOUR MONEY'S WORTH and the date of the referendum. The overall impact, however, is negative. Probably few people ever read the schools' message.

The Involved Citizens Association distributed the second brochure (*Exhibit F*). Its message is clear: Vote NO. The brochure uses relatively few words printed in a large type. The argument is made visually and is digested quickly. These two brochures and *Exhibit G* should help guide your own publication planning. The NO campaign won this election. Although other factors contributed to the loss, school supporters did not help their cause by distributing this brochure.

Campaign brochures should convey the minimum amount of information necessary to demonstrate the need for a YES vote and to serve as reminders to cast a ballot on election day.

Include the following information:

- *An Attention-Getting Statement*

For example: "SAVE OUR SCHOOLS," "OUR CHILDREN'S FUTURE," "GET YOUR MONEY'S WORTH," or "SCHOOLS FOR SUCCESS."

- *Identification and date of the event*

A school referendum is set for Saturday, Dec. 5th.

EXHIBIT E

GET YOUR MONEY'S WORTH

VOTE YES ON DECEMBER 5TH

The first step toward building new schools is selecting the site. The school district conducted a two-year site selection study. Architectural consultants evaluated and rated each of approximately 20 sites on the basis of 28 different criteria. Additionally, a preliminary educational facilities plan was prepared. As a result of increasing student enrollment numbers, the Board recently authorized the purchase of approximately 60 acres of land located in the southern portion of the city. The property was selected because of its proximity to the population center of the district, the availability of city utilities and fire and police protection, and its cost relative to the other prospective sites.

It has been estimated that the total cost of constructing a permanent high school campus on this site would be \$13 million (\$12 million for building, land and site improvement, \$1 million for movable instructional equipment). After a careful review of all data collected, we strongly believe the school system must receive the monies it needs and we urge you to vote in favor of the \$13 million bond referendum on December 5.

Although the passage of this vital referendum would result in a cost to local taxpayers of approximately eight cents per \$100 of assessed valuation over a 15-year period, it should be pointed out that district residents would still be paying considerably less for their new school than are the residents of neighboring school systems.

On December 5th you will be asked to go to the polls to vote on a proposed \$13 million bond referendum for the construction of a new high school campus. Because we believe the passage of this referendum is of vital importance to all residents, we want you to be aware of the factors involved in this issue.

Enrollment projections indicate that the situation will grow steadily worse in the years ahead. Our now overcrowded high schools will become ever more so with students finding it harder and harder to prosper in such an educational environment.

(Paid for by the Citizens for Schools Committee)

EXHIBIT F

**It's Never the Right Time to
make the Wrong Decision**

VOTE "NO" DEC. 5

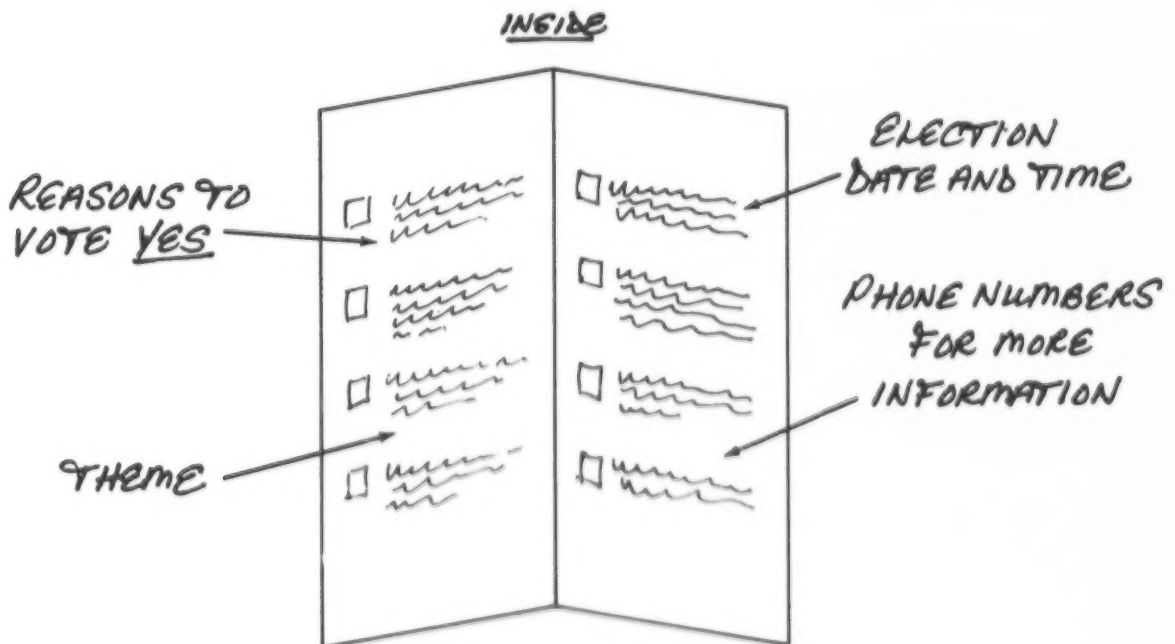
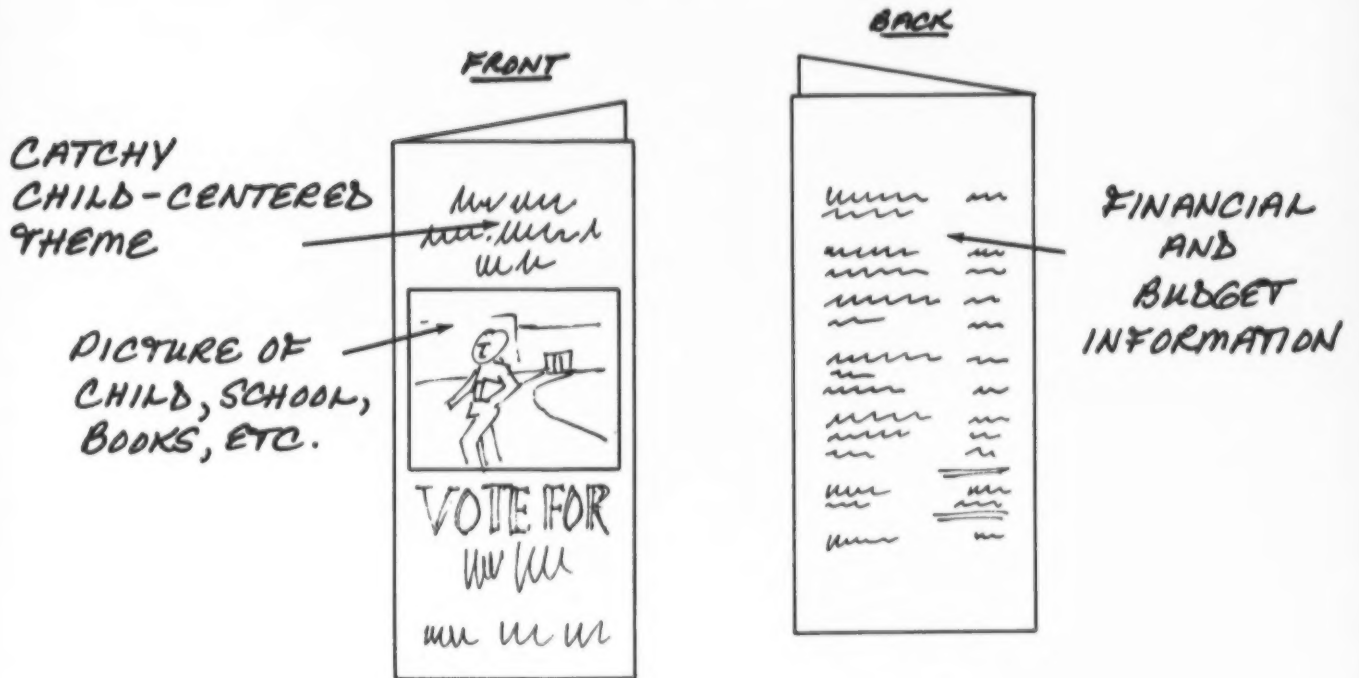
INVOLVED CITIZENS ASSOCIATION

**The Site
Is A Bad Site!**

Vote "NO" Dec. 5th

Non-Profit Organization
BULK RATE
U.S. POSTAGE PAID

EXHIBIT G
SAMPLE REFERENDUM BROCHURE





Materials used in presenting the budget must be thorough and attractive, but brief. The key to a sound presentation of the budget rests in compressing complicated plans involving large sums of money into an easily digestible format.

William Goldstein, *Selling School Budgets in Hard Times*, (Bloomington, IN: Phi Delta Kappa, Fastback 215, 1984), p.11.

Remember to deal honestly and factually with the public at all times. . . . Don't ever predict what might occur if the referendum is defeated unless these events are certain to happen.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.11 (preface).

While election facts and logic may be the foundation of the campaign, as election day nears the message becomes more emotional—aimed at the hearts and stomachs of voters.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.

Three other tips: highlight support, emphasize objectives, and focus on the children. Endorsements by organizations and prominent individuals should be trumpeted. Voting is influenced tremendously by affiliations and reference groups; it is more of a social than an individual act.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.107.

- *Reasons for the election*

To build a new library, repair roofs, expand the math-science facilities or increase the property tax levy to improve the quality of the instructional program.

- *Reasons to support the ballot*

For example:

to protect the safety of students by removing asbestos.

to protect the investment in school buildings by replacing roofs.

to relieve overcrowding at six elementary schools.

to build additional centers to accommodate the growth in vocational programs.

- *For additional information:* telephone #000-0000 and VOTE YES DECEMBER 5!

This basic information is the meat and potatoes of school campaign brochures. The attention-getting statement should be just that—words that grab the reader's attention. But at the same time the message describes the issues on the ballot. Avoid hyperbole since it calls into question the credibility of the campaign. Make the opening statement appropriate to what the voters are asked to approve. For example, don't use SAVE OUR SCHOOLS if the referendum proposes an \$11 million bond issue to build swimming pools and planetariums at the high schools.

Completely—but briefly—describe the purpose of the tax increase. Once again campaign credibility is on the line. If the money will be spent on roof repairs at three schools and for construction of a new swimming pool, don't fail to mention the pool. Tell the whole story, not just the parts you think voters want to hear. What you fail to say, others will—and probably in a way not to your liking!

The heart of the brochure is a list of reasons for supporting the ballot. These should be few in number, usually no more than three or four. State each briefly and present them in an inviting format using large type. When designing the brochure (or reviewing a draft) look at the material through the eyes of a typical school supporter who wants to persuade the next door neighbor to vote YES. The reasons must be brief, compelling, and believable. Don't make your supporter look like a chump for wanting to increase the neighbor's taxes without good reason. Plan to spend a great deal of time writing this portion of the brochure. It most likely will be your only (or most important) campaign publication. As the principal campaign "spokespiece," the brochure has the potential of carrying your message into thousands of homes. Make sure it is persuasive.

Include a telephone number on the brochure so that interested persons can request more information. Although most people will be satisfied with the material, the ones having questions are potential school supporters — so answer all inquiries with care!

Keep in mind two principles when designing and writing the brochure:

- A school election is a political campaign, not an education campaign. Therefore review the best political campaign material for examples to follow. Avoid reviewing curricula or staff literature for ideas.
- Give voters only the essential information. Be thorough and accurate, but don't bore them with details unrelated to their concerns. Be available for questions, but don't presume a generally high level of citizen interest in school issues. It doesn't exist. It's a mistake to explain all the conditions impacting the ballot. Almost no one will read what you write, nor will they listen to your discussion. School board members and administrators thrive on such detail because these matters are their business, but voters have other jobs and priorities.

HOT LINES

Establish a way to route telephone calls resulting from distribution of the brochure. Adapt the following procedure to fit the needs of your school system.

- List the telephone number of a campaign worker or staff member who relates well to people and is well informed on the election issues. (Know your local law regarding spending public funds on school campaigns. If this is a concern, be sure the staff member only gives information and steers clear of any advocacy position.) If available arrange for a "call transfer" device to switch telephone calls coming in after working hours to the person's home.
- Log each inquiry by writing down the caller's name, address, phone number, and the nature of the concern. If a recorded message machine is used during evening and weekend hours (or when the staff member is not home), the caller should provide the same information on the tape.
- Inform the caller that a written response will be mailed out the following work day. Be sure that the reply is sent as promised. After enough time has elapsed for the caller to have received and read the answer (a couple of days or so), the person should be called again to see if the question has been answered satisfactorily and to ask the caller to work in the campaign. (Again, depending on local law, it might be advisable to have the campaign worker make this request.)

The last step is crucial because it provides an opportunity to recruit more YES voters. Hot lines are, of course, good public policy. But by making an additional effort the policy becomes a smart campaign practice, too. Only a few people will take advantage of this opportunity, but they are precisely the ones you need on your campaign team. Such persons tend to be active in local affairs and are (or have the ability to become) community opinion leaders.

If at all possible, the superintendent should make some of these follow-up calls. A call from the school chief will say a lot about the importance of the election. Such action encourages citizens to sign up as volunteers.



Make the message easy to understand. Avoid technical, educational terms and sophisticated concepts. Tread lightly on figures and statistics. Numbers frighten people.
Budget/Finance Campaigns, (Arlington, VA: National School Public Relations Assoc., 1977), p.44.

The California Supreme Court in Stanson v. Mott pointed out that judicial decisions have uniformly held that the use of public funds for campaign expenses is as improper in bond issues or other noncandidate elections as in candidate elections. The Massachusetts Supreme Court in deciding that public funds spent for advocacy in a referendum were improper stated: "Surely, the U.S. Constitution does not authorize the expenditure of public funds to promote the re-election of the President, congressmen, and State and local officials (to the exclusion of their opponents). . . . Government domination of the expression of ideas is repugnant to our system of constitutional government.

James F. Clark, "Board Advocacy of Referenda, Candidates," *Wisconsin School News*, (November 1979), p.23.



How does one urban school district break tradition to reach 400,000 resident patrons and taxpayers because only 18 % are parents of its 20,000 students?... Portland School District, with about 115 regular and special schools serving a 150-square mile urban area, has been "on the road" since 1984—taking its many programs and messages of success directly to "absentee" constituents. The delivery tool is a self-contained auditorium-display vehicle capable of carrying multi-media messages to any public place. Before its purchase, redesign, and modification by the school district's public information office in early 1984, the 1969 Ford/Bluebird school bus sat in a junker lot waiting for a second career as a church or farm vehicle.

Press release from the Oregon Department of Education (November 1985).

THE INFORMATION SHEET

The second crucial piece of campaign literature is an information sheet for campaign workers. The best format is a series of questions and answers. The content should reflect whatever concerns you anticipate citizens will raise about the ballot and then should answer the questions directly, concisely, and accurately. Develop the material before the campaign kick off but schedule a revision after getting some public reaction to the sheet. Questions may be added, deleted, or rephrased at that point. To preserve flexibility, stick with a one-page typed and photocopied sheet. Follow a simple format. (See *Exhibit H*.)

Distribute the information sheet to every campaign worker. If possible, schedule a briefing session for the volunteers. At this time distribute the sheet and mail copies to those unable to attend. Even volunteers who have listened to staff presentations will want to have written answers to frequently asked questions.

Also, send the information sheet to hot line callers. If a question is asked that is on the sheet, simply highlight the material and send it to the caller. If the question is not on the sheet, then respond in a letter with the sheet attached.

EXHIBIT H
FACTS SHEET
FACTS ABOUT THE TAX ELECTION FOR THE RIVER CITY SCHOOL SYSTEM

**SO MUCH
FOR SO MANY
FOR SO LITTLE**

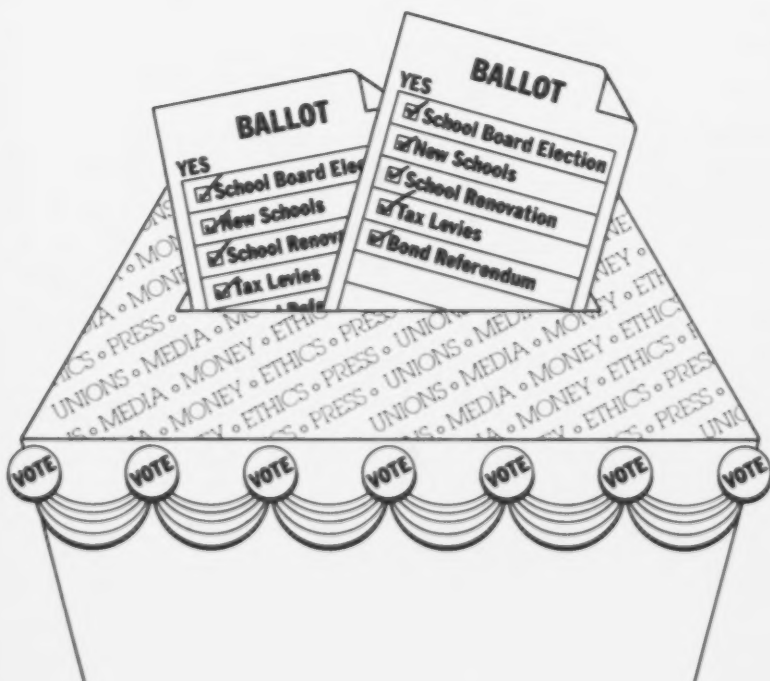
Question	Fact
What is the issue?	<i>There are insufficient budget funds</i> to take care of the 20,000 students enrolled. An additional 500 students are projected to enroll in the fall.
How much will it cost?	The tax rate would be \$1.81, only six cents more than the 1980-81 rate of \$1.60 per \$100 of assessed value. This means that the owner of a \$60,000 home will pay an additional \$10.80 per year or just three cents a day.
When is the election?	Tuesday, February 16.
Who can vote?	Registered voters living within the River City School District.
Where do I vote?	At your neighborhood elementary school.
How will the additional money be spent?	Additional teachers would be hired so that elementary class sizes can be reduced. Funds will be used to improve the educational program with the purchase of science equipment and the expansion of the vocational centers at the secondary school level.
How does the school system benefit the taxpayers?	The River City School District is the community's number one employer. The schools offer a wide range of educational programs and services to local children. Standardized test scores have risen and vocational training has been expanded. The schools house community recreation facilities and provide meeting space for community groups. In the past, taxpayers have shown strong support for local schools by approving construction bonds to build three schools.

CHAPTER 6

THE NEWS MEDIA: FRIENDS OR FOES?

INTRODUCTION

Think of television, radio, and newspapers as vital parts of the campaign's education phase—the stage preceding the campaign effort. Always resist the urge to use news media as vehicles for recruiting YES voters during the election phase of the campaign. By broadcasting messages to the general public, the news media could send the information to as many NO voters as YES voters and thereby frustrate your campaign progress. An effective strategy relies on sending messages to selected groups of school supporters. In other words, *target the YES vote.*



A common complaint in most districts is that we never get the newspaper coverage we think we deserve. One idea that has worked well for us has been sharing a page in the newspaper with other districts in the area. This idea works best in smaller communities, but could certainly be tried in any size city.

The newspaper provides us with a page each month under the jurisdiction of the advertising department. This means that they run the stories we submit verbatim with no editing. I coordinate the project for the paper and collect short items from the other districts to fill the page. This allows us to feature programs or stories that would not normally be considered newsworthy by the paper, and is an excellent means of getting some extra coverage for education.

Karen Kleinz, speaking on "Effective PR Programs Without Big Price Tags," 1987 NSBA Convention, San Francisco, CA.

Public education is complex and hard to explain. Television is especially harsh since little time is allotted to each item. There are few simple answers that fit into the 90-second format of television news, more and more the most influential of the mass media.

C.D. Norman and C.M. Achilles, "Turn National Issues into Local Opportunities," *Tennessee School Boards Journal*, (Summer 1986), p.14.



News releases should contain a contact name and phone number and a catchy headline. But don't get too fancy. Reporters don't want already written feature stories. They want the basics: who, what, when, where, why, and sometimes how.

David Siegel, "No News Isn't Good News: Effective Media Relations," *NASSP Bulletin*, (Jan. 1989), p.2.

Educators who have traditionally viewed the press as "school district enemy number one" must understand that the news media can become a partner with the school and home in our continuing quest for academic excellence.

Through progress reporting and performance recognition by the press, and with the formation of positive attitudes by employees, students, and the community, school districts can generate unprecedented public support, produce better educational opportunities for our children, and provide "the best school district PR that money can't buy."

Wendell P. Holmes, Jr., speaking on "The Best School District PR Program that Money Can't Buy," 1985 NSBA Convention, Anaheim, CA.

Participate in a talk show if you are invited to attend but make sure your host is neutral. Campaign supporters should be encouraged to phone in and offer supportive comments.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.14 (preface).

NEWSPAPERS

Newspapers are more effective communication tools than radio or television because the print medium allows for far greater detail and thoroughness. In addition, newspaper readers tend to be better educated and more involved in the community—additional pluses for the school campaign. Television and radio audiences might be larger, but the listeners and viewers will not retain much of the message. Two reasons for this exist:

1. Broadcast audiences are less interested in news than are readers of print media.
2. The broadcast media allot only a short segment of air time to any one story.

A friendly reporter is an asset to your communication plan. If the reporter doesn't understand school finance or is even unfriendly, try preparing high-quality news releases based on special financial reports presented at board meetings. In some policy areas creativity is necessary to get your message to the people, but achieving this goal is well worth the effort.

RADIO AND TELEVISION

If radio and television stations cover school board meetings, then broadcast media can help the school cause during the *education phase of the campaign*—if you prepare carefully! These forums are harder to harness because of the compressed format and their tendency to concentrate on the sensational. Typically, a television or radio station will reserve a 60-second (or less) segment to explain the financial plight of the school system. If asked for comments on the subject, never attempt to answer unless you are thoroughly prepared. Make your statement brief, interesting, and informative. A challenge, yes. But it can be done! Besides, if these media regularly cover board meetings, you should become as much of a media relations expert as possible—for your own survival.

Consider taking advantage of more focused radio and television formats. Does your area have a cable educational or community channel available for school system use? Again draw a clear line between your nonpartisan information segments and your school advocacy spots. Conveying information (especially during the *education phase* of the campaign) on the school system and its short- and long-term needs lays a sturdy foundation for subsequent ballot requests.

During the *election phase* of the campaign, consider "appearing" on a local call-in radio show focusing on the referendum or some other more general topic. Often these shows draw large followings and can promote school visibility among groups not active in school affairs.

Also, ten-second spots in favor of the school ballot—aired on *local* radio shows—in some communities are worth the investment.

ALLIES IN THE EDUCATION PHASE

The news media are valuable allies during the pre-election effort to educate citizens on the need for the referendum. Plan to involve whatever news media normally cover school board meetings. For most school systems, local newspapers are the primary channel of communication.

Board meetings provide excellent opportunities to involve the press. For instance, if the schools have a financial problem, news reports can help explain how it developed. Consider scheduling a series of special meetings spaced over several months as a time when school officials unfold the reasons for the predicament.

This type of program requires planning. If the same account is repeated at each meeting, the news value is lost. What has the potential of producing six front-page school stories may fizzle into no more than one story, if that. To be effective, each meeting must disclose a newsworthy revelation—one that will make headlines the next morning.

The story, as presented by school leaders, must have positive overtones. For example, energy costs have increased drastically causing a school budget deficit. BUT the situation would have been far worse if the able administration and prudent board had not initiated an energy conservation program two years ago. The average reader can relate to and understand the accompanying details.

If higher energy costs contributed to the schools' financial problem, tell the story well in advance of announcing the referendum. The same advice applies to other sources of financial woe: declining federal aid, erosion of the local tax base, dramatic enrollment changes, state salary or class size mandates, asbestos removal, and so on.

If school fiscal problems are linked to a declining local tax base (which often follows changes in state law on property assessment practices), communication with the public is a more complex task. Few people are interested in the intricacies of tax laws and assessment formulas. Keep this in mind when planning your program. For instance, it might take two months of weekly meetings to explain the budget impact of higher energy costs; explaining changes in local revenues might require six months or more.

During the education phase keep all news media up-to-date on school efforts. After the board selects an election date, the superintendent and board president should visit school reporters. Tell them the news. Answer questions. The action will open your campaign on a cooperative high note. If you have waged an effective education effort, members of the press will expect your announcement. Nonetheless, proceed with the formalities to make sure none is slighted.



Public educators know only too well the frustrations of negative media coverage. What they often lose sight of, though, is that reporters do cover the positive side of public schools as well.

Taking on the media isn't likely to yield a positive result. Working with the media is the best approach.

Sociologists Raymon and Alice Bauer have observed that the concept of news that dominates our reporting today dictates that an event is news only if it is discontinuous with preceding events and if it occurred recently.

The first step toward positive media relations is to find out what radio and television stations, newspapers, and community magazines cover your area.

David Siegel, "No News Isn't Good News: Effective Media Relations," *NASSP Bulletin*, (Jan. 1989), p.1.

Weigh carefully whether to run radio spots. If strong opposition hasn't surfaced, the spots may serve as a reminder to the NO voter to get out and vote.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.16 (preface).



Don't rely on the media to carry the campaign message. It's the one-on-one personal contact that often spells a successful vote.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.12 (preface).

The power of the press in referenda is considerable myth. The press is relied on heavily by the public as a source of information, the foremost one for most voters, and the newspapers' characteristic willingness to publish school promotional releases as news or features stories is a big asset for school people. The effect of editorial endorsements, however, ranges widely. . . . Possibly more influential is the subtle editorializing of feature stories by a sympathetic school news reporter, who may be the eager unofficial press agent for the school campaign.

Howard D. Hamilton and Sylvan H. Cohen, Policy Making by Plebiscite: School Referenda, (Lexington: Lexington Books, 1974), p.149.

Weigh carefully whether to initiate an extensive letter-to-the-editor campaign if opposition hasn't surfaced. An extensive letter writing campaign might backfire and cause opposition. But, be prepared and have letters ready to be mailed or hand delivered if the opposition wages a negative letter writing campaign.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.13 (preface).

AVOID THE MEDIA IN THE ELECTION PHASE

Exclude newspapers, radio, and television as much as possible from the election phase of the YES vote campaign. Without any special efforts, schools will fill enough news print columns and media spots because of the election. Most school campaigns lack the budget resources to afford television and radio commercials or newspaper ads. But even if money is available, it doesn't make sense politically. These strategies are ineffective ways to recruit YES voters.

It is possible that a friendly station owner or manager will offer free public service announcements promoting the referendum. As tempting as this might sound, be cautious about accepting the offer, especially if the campaign plan doesn't include broadcast publicity. If saying "no" risks giving offense, suggest the station manager broadcast an endorsement on the day before or the day of the election.

Depending on the circumstances of the election and the community served by the radio station, commercials could be counterproductive—especially if presented in an amateurish or offensive manner. Campaign commercials must be carefully planned, professionally produced, and aired at carefully selected times to be worth the expense.

Remember: the objective of the election phase is to communicate with YES voters and get them to the polls. It follows that communication with broader audiences always is counterproductive to some extent. The same reasoning applies to newspaper advertisements. But a newspaper endorsement is preferable to the nod of a radio or television station. Why? Because newspapers more effectively target school supporters than do other news media.

CHAPTER 7

THE YES VOTE CAMPAIGN

INTRODUCTION

A strong campaign organization is one of the keys to success on election day. Most of the organizational work takes place during the final four to six weeks of the campaign. This period of intense effort will test your campaign plan and organization in every regard.

Keep your basic objectives firmly in mind to prevent energy from being siphoned off into unproductive activities. Remember the primary campaign goal is to identify all of the community's prospective YES voters and urge them to vote.

Most school campaign organizations establish a general steering committee with several subcommittees charged with individual assignments. Publicity, election-day activity, liaison, speakers' bureau, volunteer recruitment, production (of campaign materials), finance, and canvassing are some of the familiar divisions.

Recruiting volunteers is one, if not the most, important activity in the campaign. By having persons agree to work in the campaign, you secure YES votes as well as more volunteer recruiters. Without such a commitment, the person might agree to support the ballot and then forget all about the pledge by the time election day rolls around. The promise to volunteer is a higher level of commitment, one that almost insures a YES vote for schools.

If you lay a good campaign foundation and if the work proceeds with a sense of urgency, then expect the number of people involved in the campaign to grow exponentially during the final weeks.

ORGANIZATION

Assume:

- The campaign plan has been developed and publicized;
- The campaign leadership is in place (the superintendent and citizen/staff coordinators);
- The preliminary education work has been completed.

Now the question becomes, "How do you build a team of volunteers?"

Step 1. Start with members of the school board. Whether elected or appointed, board members have supporters who have helped them attain their current positions. Each is, in some sense, an activist and should be able to identify a dozen or more campaign volunteers. Next ask the superintendent to submit a list of names. Possibilities for volunteers include neighbors, members of a bridge club or bowling team, or other friends and acquaintances.



In 1987-88 — in a nation of 244 million people — over 25 percent were students or were employed by the schools or colleges: 45.9 million elementary and secondary students; 12.5 million postsecondary students; 3.4 million teaching staff.

National Center for Education Statistics,
U.S. Department of Education.

One of our first steps was to enlist the aid of several key local organizations, including the teacher union, the PTA, and the Greater Miami business community. From these groups came local community leaders who formed an independent political action committee called "Better Schools for a Better Tomorrow" which organized community support, raised funds for the referendum campaign, and actively pushed the bond issue.

Michael Krop, "How America's Billion-Dollar School Board Is Gearing Up for Growth," *The American School Board Journal*, (Feb. 1989), p.22.



... school buildings and facilities such as gymnasiums are generally a valuable resource for the whole community because they are available seven days a week for use by neighborhood groups such as scout troupes, colleges, churches, recreation and instructional programs, and civic groups.

Unquestionably, new and expanded school facilities are needed to keep pace with the growing student and adult populations in the county. . . . All the schools slated for renewal have similar serious needs. . . . It is unreasonable to provide deteriorating buildings with limited facilities for students who must prepare for the competitive workplace of the 20th century.

For a number of years [older] schools have awaited their turns to be at the top of the renewal list. Delaying necessary additions and improvements will only make them more costly in the future. [Some] seem to advocate voting against the bond to strike back at the county for supposed failings. We voters are the county, and it is our children and school that will suffer if we do not give timely attention to our school facilities. Responsible voters will support the school bond referendum in November.

Beverly Mefferd and Cindy Stearns, Fairfax Journal, (Letter to the Editor, Oct. 4, 1988).

At this point you should have about 100 volunteers—and the work is just beginning! If you do not have close to this number, probably the persons involved are not committed enough to the school ballot. If the key people in the school system are unwilling to exert themselves to find 100 volunteers, how will others be inspired to do the same?

Step 2.

Ask school employees to submit lists of volunteers. Make the same request to the officers of the parent organizations (e.g., the PTA, PTO, and booster clubs). Their goal, like yours, is to enlist as many parents as possible in the campaign. Parents are a natural reservoir of school support. If the referendum proposes school construction or renovation, then concentrate heavily on families who will attend the new or improved schools. If a levy is up for voter approval, identify the new programs and solicit support from the likely beneficiaries.

Another tack is to publicize the fact that passage of this referendum will move other building improvements or program needs (not on this ballot) up a notch on the funding list. If voters reject the ballot, other projects could be delayed.

Step 3.

As new volunteers are identified, put them to work finding two additional volunteers. Specify a deadline (perhaps two days) for reporting the names, addresses, and phone numbers of the new recruits. Make follow-up telephone calls to the ones missing their reporting deadlines. Many of the "hesitant" volunteers will respond only with encouragement.

Remember, volunteers have other priorities, too; so apply gentle but firm pressure. Prodding is necessary to keep the campaign organization growing. Don't accept the excuse, "I would like to help, but I'm too busy." Regardless of how busy a person is, he or she can contribute at least a little time to the campaign—and probably will do so if approached correctly. Whatever approach is taken, emphasize the need for a grassroots organization. That might translate into the person giving only an hour of time—but the combination of hours can lead to victory.

Give each recruit a *campaign brochure*, an *information sheet*, a *tips sheet* with suggestions for additional volunteer recruitment, a *form for reporting the names of recruits*, and a *cover letter thanking them for their effort*. A sample cover letter, tips sheet, and volunteer reporting form appear in *Exhibits I, J, and K*.

Encourage volunteers to call campaign headquarters for answers to other questions. Sometimes recruits profit by attending a meeting to discuss assignments and election issues. However, many won't attend

EXHIBIT I

**VOLUNTEER INSTRUCTIONS
MODEL THANK YOU/GENERAL INSTRUCTIONS LETTER**

(Date)

Dear (first name of volunteer):

We really appreciate your willingness to help in passing the (name of school system) referendum. Election success is important to the future of our schools, and you are contributing to this in an extremely important way.

Please review the enclosed materials carefully. Included is a brochure describing the school ballot and the reasons for the requested tax increase. Other materials describe your volunteer assignment, the election activity schedule, and suggested answers to frequently asked questions about the referendum. If you are asked questions that you can't answer, please refer the question, the person's name, and telephone number to me. If you have any questions, please call me at (telephone number).

Your willingness to work for the school referendum is one sure sign of its upcoming success. The continued vitality of the schools can be guaranteed by your efforts.

Sincerely,

John Smith
Campaign Manager

EXHIBIT J

**VOLUNTEER INSTRUCTIONS/TIPS SHEET
VOLUNTEER RECRUITMENT**

(Date)

Dear (first name of volunteer):

The (name of school system) referendum will win only by recruiting a large number of volunteers. *Your help in this regard is critical.* Your assignment is to find at least two additional persons to work in the campaign.

These new volunteers might be anywhere in the community, for instance a relative, a friend, a neighbor, a business acquaintance, or a member of your church or bridge club. A good way to identify volunteers is to make a list of people you know are interested in and supportive of the schools. Please call each one and explain why you are supporting the referendum, and ask for a commitment of even a small amount of time. Any amount of time—however much or little—will help the school cause.

If you can recruit more than two volunteers, please do so. We need all the help we can get to pass the referendum. If you can work at campaign headquarters in the day or evening, please let us know.

Within two days, please write the names of the new volunteers on the enclosed form and return it to campaign headquarters. Meeting this deadline allows the important volunteer recruitment process to continue on schedule. You can also phone in to campaign headquarters the names, addresses, and telephone numbers of your volunteers. Please call (telephone number).

Thank you again for your help.

Sincerely,

John Smith
Campaign Manager

EXHIBIT K

**VOLUNTEER INSTRUCTIONS
VOLUNTEER RECRUITMENT REPORT FORM**

I have recruited the following volunteers to help win the (name of school system) referendum:

Name_____

Address_____

Telephone_____

Name_____

Address_____

Telephone_____

(Please list additional volunteers below or on reverse side.)

Recruiter_____

Telephone_____



Organize supportive groups in every school in the district to be present at all public meetings concerned with school needs and proposed spending. Principals should be responsible, along with their PTA/PTO constituencies, for producing lists of parents and other involved citizens who will "show" when support for the proposed budget is vital. Getting support for a proposed budget translates exactly into "getting the vote out"—and numbers frequently determine the final results.

William Goldstein, *Selling School Budgets in Hard Times*, (Bloomington, IN: Phi Delta Kappa, Fastback 215, 1984), p.12.

Some campaigns use the small group technique by organizing tea parties, etc. The Sylvania (OH) "Small Discussion" program, for example, used 200 discussion leaders, each equipped with a preliminary training period and a kit of audio-visual aids and literature. For any questions that stumped a volunteer there was a "hot line" manned by school board members.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.109.

so it's important to rely on written material and the telephone to convey information. Done properly, the recruitment activity will instill a sense of urgency in the campaign workers. Let them know the importance of their assignments. Remember, everyone wants to be on a winning team. Volunteers need reinforcement when they are feeling unsure or do not know how to proceed.

Some will need little or no additional help. They complete their assignments before deadline and recruit not two but three, four, or five volunteers. Plan to invite these super-volunteers to campaign headquarters to make follow-up calls. Consider them for the job of precinct captains or for other leadership roles in the campaign. In general, it is better to fill the leadership positions gradually than to make all the assignments at the start of the campaign. The slower method results in higher quality, more committed leaders—and less deadwood.

Selecting a supervisor for the volunteers is one of the critical personnel choices in the campaign. Responsibilities include volunteer training and file maintenance. Keeping an up-to-date record of each recruit's name, address, and phone number is necessary so that volunteers can be contacted quickly as the volume of work increases or other developments occur.

THE ART OF PERSUASION

Try a variety of approaches to enlist volunteer help. What works on one person won't convince another. Ideally, recruiters will know the people they contact. In most cases, recruiters call on friends and relatives and therefore can select the appropriate appeal. Little time is wasted trying ineffective approaches. Regardless of the specific ballot requests, most volunteers are persuaded by appeals to their responsibility as citizens to help children receive a quality education. However, others may be coaxed by emphasizing the idea of joining a winning team. Likewise, some will be moved by calls to community pride, rising property values, or providing comparable school facilities (e.g., air conditioning older schools). Have a list of popular reasons at your fingertips when recruiting so that if one approach fails, another is on hand. Even if you encounter some failures, don't give up!

HOSTING COFFEES

Hosting coffees, another popular way to recruit volunteers, has been a long-time strategy for first-time political candidates. The gatherings are effective in school elections, too. Schedule coffees during the period from four to eight weeks before the election.

Begin the activity by asking each first-round volunteer to invite from 10 to 20 friends and neighbors to his or her home for coffee. Although most will refuse to serve as host, some will agree.

Plan the events, scheduled in the day or evening, around the superintendent's timetable. It's important that the school chief (or a

board member) attend and make a brief presentation on the schools' behalf. Again, the purpose of the coffee is to recruit volunteers. Try to enlist as many of the guests as volunteers as is possible.

Make the program brief; allot no more than 45 minutes for the presentation and questions. If the superintendent is willing, fill his or her schedule with two or more coffee meetings on each available evening. This technique usually results in a growing army of volunteers in a short period of time.

SCHOOL PRECINCT

The campaign organization's basic building block is the geographic area served by each polling place. *Each precinct needs poll watchers, runners, telephone callers, postcard writers, and a precinct captain.* If the school district has more than ten precincts, you might want to add a coordinator to oversee the precinct-level work. And don't forget to involve all precinct workers in volunteer recruitment.

The captain's main responsibility is to oversee election-day activities at the precinct. Delegate responsibility for these critical activities only to a dependable, well-organized person.

Two rules of organization apply to school campaigns. First, keep the central campaign organization as lean as possible. A complicated organizational hierarchy insulates both the coordinator and the volunteers from one another. Second, the campaign coordinator should stay in frequent contact with volunteers either via letter or telephone. Otherwise you run the risk of losing the sense of immediacy and urgency that is crucial to motivating volunteers during the final weeks.

How many workers are needed for each precinct? As many as you can get. Remember, the principal job of all volunteers is to recruit more volunteers, each of whom will vote YES for the school ballot. Provide real-work (not make-work assignments) for volunteers. Once persons have taken the all important step of making the personal commitment, they want to feel they are contributing to the campaign. Don't disappoint your potential YES voters.

As volunteers are identified, sort the names, addresses, and phone numbers according to precinct. Check the lists frequently as the organizational building process continues. Your knowledge of the district should help predict where most of the prospective YES voters reside and, therefore, where the organization should be strongest.

If you see that certain supposedly strong precincts lack volunteers, immediately expand the level of effort in these areas. Ask several volunteers to host coffees. Or simply request the precinct's volunteers to redouble their recruitment efforts. At any rate, by listing volunteers according to precinct as they are recruited you will be aware of any weak spots in the campaign. This gives you time to solve the



U.S. West Communications is making passage of school funding measures its highest priority for the corporation's contribution dollars. According to U.S. West's legislative affairs director Gary Wilhelms, it is not uncommon for the corporation to get involved in community issues. "We support, as do most people, a good, solid public education system. . . ." U.S. West will provide support for local levy campaigns, in addition to encouraging their employees to become involved in public affairs activities, including school funding.

"School Funding a High Priority with U.S. West Communications," *Outlook & Review*, (Oregon School Boards Assoc., Dec. 20, 1988), p.1.

- *Update and validate the YES vote list, cull those who move or who are not showing support for school programs. Add positive individuals whose behavior indicates support of the schools.*
- *Continue to use a variety of media to communicate with the general public about the positive aspects of the school program. As often as possible, make a direct tie or link between the requested tax and quality instruction.*

William F. Kromer, "The Election is Over, What's Next? *Michigan School Board Journal*, June 1988), p.23.



There is a consensus among pros that the canvassing organization is the most critical unit, "the real key to success."

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.104.

Perhaps the most valuable function of the citizens committee is that it clothes the goals of school people with at least some appearance of legitimacy. What could be more disastrous for an election proposal than for it to have the appearance of being an effort by school personnel to benefit themselves, of being a struggle between the school people and the taxpayers?

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.102.

problems—before it's too late. The activity also provides work for volunteers who don't like making telephone calls.

INVOLVING POLITICAL LEADERS

In general, steer clear of partisan politics. Carefully weigh the pros and cons before asking for the help of elected officials. Critically evaluate whether to involve local political leaders in the school election. In some communities where political leaders are popular and serve as opinion leaders, their involvement is crucial to election success. In others, the school ballot will do better within a nonpartisan environment, steering clear of local politics. Remember that even the most popular officeholder carries some negative baggage, and you don't want your campaign to draw opposition simply because of the support of one politician.

To sum up:

- Start the campaign with the superintendent as organizational chief, a citizen campaign coordinator (or manager), and a staff liaison or resource person.
- Begin volunteer recruitment about six to eight weeks before the election.
- In four to six weeks the campaign organization should be fully staffed.
- Devote the final two weeks of the campaign to organizing precinct activity.

CAMPAIGN METHODS: CANVASS, TELEPHONE, AND MAIL

Goals:

- Find YES voters.
- Periodically reinforce the YES voters' support.
- Remind school supporters to vote.

Methods to accomplish the campaign goals include: direct mail, telephoning, and door-to-door canvassing. Recall the previous advice on election strategies: *the more personal the contact, the more persuasive the message*. In this armory of weapons the most powerful is door-to-door canvassing.

CANVASS FOR SUPPORT

Canvassing has three objectives:

- Identify prospective YES voters.
- Recruit additional volunteers.
- Emphasize the importance of the referendum and urge school supporters to vote.

Start this activity about six weeks before the election (or well in advance of the closing date for voter registration) and continue until the

day of the vote. In a YES vote campaign, first identify those areas of the community where you expect the majority of YES voters to reside. Next arrange to visit all homes in the selected neighborhoods. This may sound difficult and tedious—and often it is. But, in the long run, this method encourages the most productive use of time.

This work can be done by volunteers working in groups of two or four: one on each side of the street or two on each side alternating houses. The best time to canvass is when the greatest number of people are expected to be at home. In some communities this may be late Saturday morning and afternoon. In areas where fewer mothers work outside the home, try canvassing on weekday afternoons, usually after school but before dark. Do not be deterred by snow, light rain, or cold: the worse the weather, the more likely the residents will be at home.

The procedure is simple. When the occupant comes to the door, introduce yourself and say you are working on behalf of the school referendum. Offer a campaign brochure and information on the polling place and registration. Inquire as to the person's (and eligible family members) registration status and be open to answering questions.

If the response is positive (both in terms of registration and support of the referendum), designate the resident as a YES vote and add the name to the list for calling on election day. If the individual's response is extremely positive, invite him or her to volunteer. If the occupant responds negatively, offer a courteous "thank you" and go on to the next house. Don't waste time trying to convert an opponent. It's far more important for the army of supporters to grow quickly and to form a groundswell of support for the campaign than it is to win a few "resisters" to your cause.

Establish a way to maintain a record of the responses. The local election commission might provide a list of registered voters organized by precinct and street address. Then simply check off the names of persons giving positive responses. You will find that some persons who say they are registered in fact are not. These individuals can be contacted again and offered assistance with transportation, babysitting, or finding the registrar's office.

In some metropolitan areas a city directory provides the names, addresses, and phone number of residents. In this case, note the addresses of school supporters and later retrieve the names and telephone numbers from the directory. A small microcassette recorder is a convenient way to record addresses and other information. Whatever recording method you use, spend as little time as possible logging the information. To do otherwise significantly reduces the number of homes you visit. The idea is to see as many people as possible within a few hours.

The superintendent's participation in general canvassing activity can have a positive impact on voters in some communities. Mrs. Jones will tell her friends that the school chief stopped by asking for her support. Mr. Jones will mention the event to his colleagues. Soon the word has spread that the election must be important since a great deal of



Occasionally one sees some hard-data evidence of the significance of canvassing. A survey of a budget election and a proposal to establish kindergarten in Eugene, Oregon indicated that the measures lost not because they were minority viewpoints in the community but because the campaign failed to deliver the potential votes.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.105.

The creation of a winning attitude through the association of positive people in the campaign is of utmost importance.

Timothy G. Nusbaum, speaking on "The Use of Internal and External Marketing To Turn Critics into Fans," 1987 NSBA Convention, San Francisco, CA.



It's almost impossible to change the minds of opponents, but supporters and undecided voters need to be targeted.

Jeannie M. Henry, "Help for Passing Bond Referenda," *School Business Affairs*, (Dec. 1987), p.27.

The referendum can easily be defeated if the telephone banks aren't well organized and if there isn't a sense of commitment from the volunteers. Many communities employ professional surveyors who can easily handle this chore.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.21 (preface).

time and energy is being expended by the superintendent. As a result, individuals will be more willing to give their own time and energy. Similar results can stem from the participation of individual school board members.

Don't hesitate to canvass for YES votes. The great majority of people won't be annoyed by your visit. In fact, they will be pleased that you asked for their support. The occasional unfriendly response will be greatly outnumbered by friendly and interested ones.

Canvassing presents opportunities for newspaper publicity. Although the strategy in YES vote campaigns advises against general publicity, make this your exception. Notify the press of the superintendent's plan to canvass neighborhoods. Give specific times and locations. Most newspapers will see the event as a photo opportunity. (You might even make this suggestion yourself.) An alternative would be for the campaign organization to arrange for a photographer; afterwards you could distribute pictures to any newspapers not covering the event. The best time for the activity is a Saturday morning or some other time when the superintendent isn't expected to be in his or her office.

CALL FOR VOTES

Use the telephone to:

- Identify YES voters.
- Recruit volunteers.
- Remind supporters to vote.

Consider a typical situation: A volunteer calls a friend to ask for help in the school campaign. Volunteers should have a script on hand when they telephone canvass neighborhoods. The script should list the questions to ask in the correct order as well as a variety of likely responses. Include a reminder to keep the call brief and to the point. Also allot some space for a paragraph to reassure volunteers that most persons will welcome the calls. (See *Exhibit L*.)

Telephone canvassing is a poor substitute for door-to-door canvassing in terms of impact and effectiveness. However, sometimes you have no alternative. Some school systems have relied on telephone canvassing and won the election. But emphasize door-to-door canvassing if your organization has a sufficient number of volunteers.

Telephone canvassing takes the same approach as door-to-door canvassing. First, compile the names, addresses, and telephone numbers from available local directories. Proceed by calling each household and asking the same questions as you would if door-to-door canvassing. Also, plan to telephone canvass the memberships of organizations that are likely to support the referendum.

Consider asking local real estate offices to let campaign workers use a portion of their "phone banks" during off-peak hours. High school students are effective (and usually enthusiastic) telephone canvassers so long as they are trained properly. Although some school campaigns

EXHIBIT L

MODEL TELEPHONE SCRIPT FOR BLIND CANVASSING

"Hello, this is _____. I'm a volunteer calling on behalf of the (name of school system). As you may know, the school system is conducting an election on (date). We are asking voters to increase the school tax rate by (whatever amount) per \$100 of assessed value in order to provide money to expand and improve the math and science curriculum. Are you willing to donate even a small amount of time to the school campaign?"

If the answer is yes, write down the person's address (if you don't already have the information). Then say: "Thanks" and end the phone call.

If the person says "no" or gives some other negative response, simply say: "Thank you" and end the phone call.

Don't argue on the telephone. It generally is an unproductive use of time to try to convince a skeptic. Place a negative mark by the person's name so that a second-round phone call won't be made.

If the person asks a question or two, respond if possible. If you're unsure of the answer, note the question and refer it to campaign headquarters for a follow-up call. These return calls should be completed as quickly as possible so the initial call is fresh in the voter's mind.

Never stay on the telephone too long. Identify yourself, quickly state the purpose of the call, get a response, then say "Thank you," and go on to the next call. Remember, the person you called was doing something else when the telephone rang. It's best to assume the person wants to get back to the activity. If you delay the person unnecessarily, you might prompt a negative response when a positive one was possible. So remember to be brief.



Three generalizations may be made about the turnout for school referenda: the voting rate usually is rather low; there are tremendous differences, from less than 10% in some elections to over 90% in others; and amazing fluctuations may occur in the same community.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.49.

hire professional agencies to make these calls, these individuals often are far less effective than dedicated volunteers.

The telephone is the principal communication tool for get-out-the-vote efforts on election day. This process is described in the following section on election-day activity.

MAIL FOR VOTES

Direct mail promotions are more wisely sent to prospective YES voters, not to persons who are likely to oppose the referendum. Never encourage opponents to "get-out-and-vote." Properly targeted materials sent to "undecided" voters late in the campaign can produce positive results for the schools. Carefully evaluate the types of mailing lists that are available. Always try to limit mailings to registered voters to conserve the printing and postage costs.

"Friend-to-friend" postcards containing the sender's endorsement of the ballot usually generate strong support. Postcards also serve as convenient reminders to vote. The cards may be preprinted with enough space left for the address along with a personal note. After stamping the cards, the writer delivers them to campaign headquarters for mailing just before election day. Prospective YES voters receive this tangible reminder to vote on the day before the election. Hopefully, the postcard is placed next to the person's list of things to do on election day.

As reminders to vote, postcards are less effective than election-day phone calls to school supporters who have not yet gone to the polls. However, if the election is scheduled on a work day (when more people are at work and cannot be reached by telephone), postcard reminders should increase the turnout of YES voters. But conduct the preferred get-out-the-vote activity (phone calls to school supporters) if the election is held on Saturday and the campaign organization is fully staffed.

NEWS MEDIA

Obtaining media endorsements is not a major concern in YES vote campaigns because the messages are broadcast to both YES and NO voters. Nonetheless, it is wise to visit the local newspaper offices soon after (or before) the referendum is announced to explain the campaign issues. If the publisher is sympathetic and makes it difficult to refuse an endorsement, then ask for the announcement to be delayed until late in the campaign. In fact, if the publisher will hold the endorsement until the day before or the day of the election, so much the better. Plan to forego radio and television endorsements altogether. In any event, do not solicit news media support during the election phase of the campaign. Conserve your energy for more productive activities.

Endorsements by some organizations might boost the campaign. For example, some of the members might volunteer once the organization's executive committee or board has agreed to support the ballot. Such an endorsement would not have to be made publicly but could appear in the organization's internal communications to its membership. Only in this situation should you seek an endorsement in a YES vote cam-

paign. Even then don't expend extensive resources or time in this pursuit. Instead, concentrate on direct communications with the membership.

ELECTION-DAY ACTIVITIES

If you don't get school supporters (YES voters) to the polls, all your recruitment efforts might be wasted. It is impossible to overemphasize the importance of these activities. Remember, the election is not the highest priority of most voters. They must be reminded to vote on the day of the election. Well-organized people will mark their calendars. Many (probably the majority) simply will try to remember—but some will forget. It is essential, therefore, to counteract the non-voter syndrome. Otherwise you might face a rude surprise when the votes are tabulated.

One way to increase the YES voter turnout is to organize the lists of YES voters (names, addresses, and telephone numbers) according to their school polling places. The day before the election (until this time the list should be growing) make three copies of each list. On election day, station a poll watcher at each polling place with the lists. The watcher's job is to check off names as voters arrive at the polls. Various states have different laws regarding poll watchers. Consult your school legal counsel regarding local restrictions. (See *Exhibits M-P* for sample poll watcher instructions.)

About halfway through the voting period, deliver one copy of the YES voter list (appropriately marked to show who has not yet voted) to volunteers who then call the designated persons with polite reminders to vote. (See *Exhibits Q-T* for the related samples.) If some people indicate they need transportation, babysitting, or other help to get to the polls, be sure to offer the service. The runner (or runners) who deliver the lists to the callers might be able to provide the transportation. (See *Exhibits U and V* for sample instructions for the runners.)

Approximately two hours before the polls close, repeat the process using the second copy of the precinct's YES voter list.

Each precinct requires at least two poll watchers, one or more runners to deliver the YES voter lists, and one telephone volunteer for every 15 voters to be called. The runners also may double as callers, especially for the first round of calls when the list is longest. Ideally, however, the runners are more effectively deployed to help voters get to the polls.

If the referendum occurs on a weekday, reconsider the need for two rounds of follow-up calls. On weekday elections, most votes are cast early before work or during the late afternoon after work. The best procedure is to schedule one round of calls in the middle of the afternoon. A second round of calls might be pointless. (That's why it's best to schedule referenda on Saturdays whenever possible—and make two rounds of calls.)

For a weekday election, use postcards to supplement the election day telephone reminders. You might think of other creative and suc-



Poll watchers begin their duties when the polls open and finish after the votes are counted at the precinct level. The poll watcher sits quietly and never interferes with the election process.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.22 (preface).



Many a referendum is defeated because those involved did not follow through with identifying the YES vote. YES vote identification is the one single factor that can help win an election. . . . Throughout the campaign, strategy revolves on meeting the informational needs of the YES voter and getting them to the polls.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.7 (preface).

It was critical that the levy committee create the illusion that the momentum would swing, that we were headed in the right direction, and that we would win in November.

Timothy G. Nusbaum, speaking on "The Use of Internal and External Marketing To Turn Critics into Fans," 1987 NSBA Convention, San Francisco, CA.

cessful ways to send these messages to school supporters. Whatever the means don't let the activity be forgotten amid the election week commotion. Reminders to vote are essential for election success.

Even this extraordinary effort won't produce a 100 percent YES voter turnout. But it will result in the largest possible number of YES votes. Such an effort demands superb organizational work that is begun weeks in advance of the election. Election-day precinct activity is a satisfying culmination for the large number of volunteers recruited during the campaign.

Election-day activities should, of course, end with a celebration at election headquarters—win or lose. The day must end with a visible expression of thanks to those who have worked so hard during the campaign. It's important for campaign workers to gather together to listen to the election results. Much of the campaign work will have been accomplished by individuals or small groups. This makes it all the more important to assemble the entire group at least once to emphasize the team effort. Such an event does more than promote school elections, it strengthens the campaigners' overall support for schools.

TIMING CAMPAIGN ACTIVITIES

Proper timing is crucial to a successful campaign. Remember, the attention span of average voters is short and the referendum might be low on their priority list. Voters are preoccupied with other concerns of job, family, or recreation. Therefore, school campaign organizers must plan carefully so that voter involvement peaks on election day—not days or weeks earlier. If you badger citizens for weeks before the election, they will tune you out and pay no further attention to your messages. It goes without saying that a turned-off public will not vote on election day or might vote NO.

A successful campaign should aim for six contacts with the typical voter. Consider the following schedule:

- Make the first contact three weeks before the election.
- Complete two more contacts two weeks before the election.
- Schedule three final messages during the last week of the campaign.

The contacts can occur in a variety of ways (or a combination thereof) including telephone calls, letters, and postcards. The release of the messages should be timed to build a growing sense of urgency and need for action (voting). If the messages are spread over too long a time, voters will lose interest. If too many are sent, the messages become unwelcomed intrusions—a situation that often leads to a negative reaction or backlash.

Obviously, you will have to contact some individuals six or more weeks before the election. Therefore plan to ask the first batch of potential

volunteers—those tagged by board members and the superintendent—to work in the campaign as well as to find two more volunteers.

Early in the campaign, volunteers are needed for the nuts-and-bolts organizational work. These jobs will increase as the weeks pass. Sorting the growing lists of YES voters by precinct; preparing postcards for mailing; and organizing precinct teams of poll watchers, runners, and callers are a few of the campaign activities that must be staffed.

Many of the initial volunteers probably will want to join one of the precinct teams. Even though some volunteers will have campaigned actively for three to six weeks, their work, too, will culminate during the week of the election. The reason for this is simple. Volunteer recruitment is based on the principle of "each one finds two more." Consequently about half of the volunteers are identified in the last week of the campaign. Similarly, half of the precinct voter lists are compiled during that time, half of the postcards are addressed, and so on.

Although a successful campaign starts slowly, it builds rapidly with good organization. Don't be lulled into thinking you have plenty of volunteers if campaign headquarters is a bit quiet with five weeks to go until the election. If the campaign is progressing on the planned course, the workload will double each week. Without careful preparation you can lose control of the campaign during the final week.

See *Exhibit W* for sample campaign timelines. These timelines should be regarded only as approximations. Effective timelines will vary according to local circumstances. For example, two months have been earmarked for an analysis of community views. The study is scheduled to begin seven months before the referendum. If the results are positive, then the remaining five months can be devoted to other campaign activities. However, if the poll reveals negative attitudes, then plan on additional work before proceeding further. It may require several months of sustained effort before significant improvement occurs. Only then should the campaign "clock" start ticking.

At times campaign organizers will be pressured to condense the time periods allotted to the early stages in order to schedule the election sooner. Sometimes this can be done without jeopardizing election success. But the education phase seldom can be completed in less than five months. Remember, a campaign is like a building: the stability of the final portion depends on the construction of the floors beneath. Inadequate preparation during the first phase will be all too apparent during the frenetic final weeks of the campaign. The consequences are grim: chaos, few or no volunteers, and insufficient YES votes. Agree to a tighter schedule only if the reasons are compelling because the tradeoff is fewer YES votes on election day.



The bond-issue push began actively in July 1987 in a campaign orchestrated to build slowly and climax on election day in March 1988. . . but the heart of the campaign drive was an eight-month grassroots effort to reach out to voters.

Michael Krop, "How America's Billion-Dollar School Board Is Gearing Up for Growth," *The American School Boards Journal*, (Feb. 1989), p.22.

Our campaign began in earnest immediately after the May defeat. Our first obstacle was to overcome the feeling among many that this campaign was going to be similar in scope to past failures. To combat this attitude, we stressed a positive approach to all employees and campaign workers. We constantly repeated our theme, "We must win now." Much of our early energy was spent in finding the right people to staff our campaign. Our emphasis was on locating volunteers who like to be winners, but who were also able to dedicate themselves to the task at hand.

Timothy G. Nusbaum, speaking on "The Use of Internal and External Marketing To Turn Critics into Fans," 1987 NSBA Convention, San Francisco, CA.



A timeline is a detailed schedule of events that must occur for a campaign to peak on election day. Most campaigns are designed to be low-key until two weeks before the election.

Jeannie M. Henry, "Help for Passing Bond Referenda," *School Business Affairs*, (Dec. 1987), p.27.

The timelines assume that school officials have kept the public aware of the schools' fiscal situation as part of the education phase of the campaign. If this is not the case, then schedule additional time for this activity.

The timelines also omit any state legal requirements. Consult the school attorney for this information, for example, the publication of legal notices or sample ballots.

EXHIBIT M

**POLL WATCHER INSTRUCTIONS
MODEL THANK YOU /GENERAL INSTRUCTIONS LETTER**

(Date)

Dear (first name of volunteer):

We really appreciate your efforts on behalf of the (name of school system) referendum.

Will you serve as a poll watcher in your precinct? This is an important assignment because the poll watchers will tell us which of our supporters have voted and which have not. On election day this information will be relayed twice to the team of telephone callers. The callers will follow up with reminders to vote.

Enclosed is a sheet describing the rights and responsibilities of poll watchers as specified in local law. Please read and become familiar with these regulations. The materials referred to will be provided. As a poll watcher you will be at the precinct as an observer to record the names of voters. Please do not attempt to challenge any voter.

Enclosed is a timetable that describes your responsibilities in more detail. If you have any questions, please call me at (phone number).

Thanks again for your help with this important assignment.

Sincerely,

John Smith
Campaign Manager

encl.

EXHIBIT N

**POLL WATCHER INSTRUCTIONS
PRECINCT ASSIGNMENTS**

Your precinct is # _____

The polling place is _____

Your precinct coordinator is:

Name _____

Address _____

Phone _____

EXHIBIT O

**POLL WATCHER INSTRUCTIONS
SAMPLE STATEMENT OF RIGHTS AND RESPONSIBILITIES
OF POLL WATCHERS**

IMPORTANT: This is a sample. Election laws vary from state to state. Have school legal counsel obtain your state law governing the work of the poll watchers.

1. The State Board of Elections Regulation 1976-10 (date of regulation/law) established the qualifications and number of poll watchers in school elections. They are:
 - a. Candidates are permitted two poll watchers per precinct. Such poll watchers must be registered as voters in the district in which they are poll watching.
 - b. A qualified civic organization, which has among its purposes the investigation or prosecution of election fraud, is entitled to one poll watcher per precinct. Each poll watcher must be registered as a voter in the district in which he or she is poll watching.
 - c. Organized proponents of a ballot proposition are entitled to two poll watchers per precinct. Organized opponents of a ballot proposition are entitled to two poll watchers per precinct. Such proponent and opponent organizations must be registered with the election authority. Such proponent and opponent poll watchers must be registered as voters in the district where they are poll watchers.
2. Each watcher must have an affidavit executed by the candidate or campaign manager he or she represents. The document should designate the person as a poll watcher on behalf of the candidate or the ballot. The affidavit should be given to the judges of election and returned to the election authority after the election.
3. The watchers are allowed to be in the polling place while the polls are open and may remain with the judges until all votes are counted and the results declared. Poll watchers may be removed by the judges if they interfere with the conduct of the election. The poll watchers may leave and return to the polling place while the polls are open. However, after the polls close, readmittance must not interfere with the conduct of the election. Readmittance is at the discretion of the judges.
4. Poll watchers are present to observe the conduct of the election and to report any irregularities to the election authority. The poll watcher should be near enough to the judges' table to visibly examine the affidavits and poll book. After the polls close, poll watchers may stand close enough to the judges' table to observe the counting of votes. However, the poll watcher may not interrupt a line of voters while making observations. Poll watchers are not to handle any election materials.

(continued)

5. Poll watchers may challenge any voter's qualifications to vote. Judges also may challenge voters. When a person's right to vote is challenged a *specific reason* for such challenge must be stated. Examples of specific reasons are:

- a. The voter is not a registered voter.
- b. The voter no longer resides in the district.
- c. The person attempting to vote has already voted.

A poll watcher who makes unfounded or indiscriminate challenges may be removed from the polling place for interfering with the conduct of the election.

6. When a voter is challenged, the judges vote on whether to sustain the challenge. If the challenge is sustained by a majority vote of the judges, the voter must complete an "Affidavit of Challenged Voter" accompanied by a supporting affidavit of another registered voter in the precinct attesting to the voter's qualifications. Any challenged voter who votes by affidavit, but is later found to be unqualified, has committed perjury and is subject to criminal penalties.
7. A poll watcher observing the vote counting after the polls close may object to a ballot because of an apparent irregularity (improperly marked ballot, identifying mark on ballot, etc.). A majority of judges decides whether or not to count the "objected to" ballots.

EXHIBIT P

**POLL WATCHER INSTRUCTIONS
MODEL TIMETABLE FOR POLL WATCHERS**

[Give specific date] Pick up computerized printouts of voting lists from campaign headquarters. Review the procedure for poll watching. Then a member of the campaign staff will answer your questions.

[Give specific date] **ELECTION DAY**

Please arrive at the polls by 6:30 a.m. in order to organize for the day's activities. The polls open at 7 a.m. Place your table in a position where it will not interfere with the voters or election judges, but where you can hear the names of the voters as they are called off the list.

You will have three copies (one original and two copies) of a list of voters known to support the school ballot. When a voter's name is called, strike out the name if it appears on your list. At 1 p.m. the precinct coordinator will take one copy of your list and distribute it to callers who will telephone persons whose names have not been deleted. (Note: In larger precincts there may be more than one coordinator. A separate sheet is enclosed with the names of the precinct coordinator(s). The number of coordinators will help you determine how to divide the calling list.)

Repeat this process at 4 p.m.

The polls close at 7 p.m. As soon as possible after the polls close, call campaign headquarters at (phone number) and report the total number of voters on your list who voted and the total number of votes cast in the precinct.

Although this will conclude your responsibilities, you may want to remain and observe the ballot counting procedure.

DON'T FORGET TO VOTE YOURSELF

EXHIBIT Q

TELEPHONE VOLUNTEER INSTRUCTIONS

(Date)

Dear (first name of volunteer):

We really appreciate your efforts on behalf of the (name of school system).

Will you serve as a telephone volunteer on the day of the election (give date)? This work is important to assure the success of the election. The task involves making two rounds of short telephone calls, the first at about 1:30 p.m. and the second at about 4:30 p.m. Your precinct coordinator will deliver a list of school supporters to call and remind to vote. (The coordinator's name appears on the enclosed list.) Sample scripts for these calls are enclosed.

Thanks again for your help in providing quality schools.

Sincerely,

John Smith
Campaign Manager

encl.

EXHIBIT R
**TELEPHONE VOLUNTEER INSTRUCTIONS
PRECINCT ASSIGNMENT**

Your precinct is # _____

The polling place is _____

Your precinct coordinator is:

Name _____

Address _____

Phone _____

EXHIBIT S

**TELEPHONE VOLUNTEER INSTRUCTIONS
SAMPLE SCRIPT**

If you anticipate any difficulty in making your phone calls, please inform your precinct coordinator as soon as possible.

SCRIPT FOR FIRST TELEPHONE CALL — (date)

This is _____. I'm a volunteer for the (name of school system) referendum. I'm calling to see if you have voted yet. If you haven't, we really need your vote. The polls are open until 7 p.m. tonight. If you need a ride or other assistance, I'll be glad to arrange it for you. Thanks, and we'll see you at the polls.

SCRIPT FOR SECOND TELEPHONE CALL — (date)

This is _____. I'm calling to ask if you had the chance to vote yet in the [name of school system] referendum. (If the answer is no) . . . The polls close in _____ hours. We urge you to vote on this extremely important issue. Thanks again for your consideration. (If the answer is yes) . . . Thank you for voting.

EXHIBIT T

**TELEPHONE VOLUNTEER INSTRUCTIONS
MODEL TIMETABLE FOR TELEPHONE VOLUNTEERS**

[give specific date] **ELECTION DAY**

Please go to the polls and vote early.

First round of calls

Calling lists are delivered between 1 and 2 p.m.

The persons on these lists whose names are not crossed out should be telephoned and encouraged to go to the polls and vote.

These calls should be completed before 3 p.m.

Second round of calls

Revised calling lists are delivered between 4 and 5 p.m. The persons on these lists should be encouraged once again to go to the polls and vote.

These calls should be completed prior to 6 p.m. because the polls close at 7 p.m.

EXHIBIT U

**PRECINCT COORDINATOR INSTRUCTIONS
RUNNERS**

(Date)

Dear (first name of volunteer):

Thanks for your help in passing the (name of school system) referendum. The success of the election is vital to our schools' future growth and development. You are helping in an extremely important way.

Will you serve as coordinator of your own precinct? (More than one coordinator will be assigned to precincts with more than eight telephone volunteers.) Enclosed is a copy of the list of telephone volunteers who will be working with you.

At 1 p.m. and again at 4 p.m. on the day of the election, the coordinator will pick up copies of the telephone lists from the poll watchers. The coordinator should deliver the lists to the telephone volunteers who then will make the reminder to vote telephone calls to school supporters.

The role of coordinator is key to the success of our election effort and we hope you will accept this responsibility. After reading the enclosed materials, please call me at (phone number) if you have any questions.

Thanks for your help in this important work.

Sincerely,

John Smith
Campaign Manager

EXHIBIT V
PRECINCT COORDINATOR INSTRUCTIONS
RUNNERS

Your precinct is # _____

The polling place is _____

Your telephone volunteers are:

Name	Address	Phone Number
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

The poll watchers are:

Name	Address	Phone Number
_____	_____	_____
_____	_____	_____

EXHIBIT W
CAMPAIGN TIMELINES

ASSIGNMENT	YES VOTE CAMPAIGN	COMMUNITY CRUSADE
Analyze community views	7 months before the election	11 months before the election
Identify YES votes	5 months before the election	9 months before the election
Develop campaign plan	4 months before the election	8 months before the election
Obtain endorsements	not applicable	7 months before the election
Media contacts		
Build campaign organization	3 months before the election	3 months before the election
Identify first-round of volunteers		
Locate headquarters		
Recruit volunteers	2 months before the election	2 months before the election
Schedule coffees		
Door-to-door canvassing		
Complete organization assignments	1 month before the election	1 month before the election
Telephone canvass		
Friend-to-friend cards		
Get-out-the-vote	ELECTION DAY	ELECTION DAY
Follow-up activities	1-2 weeks after election	1-2 weeks after election
Say thank you		
Analyze election data		
File campaign report		

CHAPTER 8

THE COMMUNITY CRUSADE

INTRODUCTION

A community crusade, the second type of school campaign, refers to the breadth and depth of the public involvement in the election. A community crusade—and not a YES vote campaign—should be launched in one of two circumstances:

- The school system is a small one where schools are social as well as education centers in the community. In other words, it's impossible to conduct a referendum without involving the majority of citizens—YES and NO voters alike. Therefore your campaign plan must encompass the entire community, not just school supporters.

OR

- The predicted NO voters outnumber the YES voters no matter how hard you try to identify likely supporters. Such a situation might exist when the opposition is strong and organized or when the schools have lost public confidence. Perhaps the school system has already lost two or more elections while using the YES vote strategy. If the YES vote plan was implemented properly in the earlier attempts, then try the community crusade.

Most nonrural school systems should continue using YES vote campaigns. If the strategy has been tried and failed, however, then thoroughly and objectively study past efforts before launching a community crusade. Relevant questions include:

- What conditions account for the election failure?
- Was the school board divided in its support of the ballot?
- Was the YES vote campaign poorly organized or does some other basic reason explain the poor community support?

In school referendum campaigns, misses do not count. In fact, election losses are counterproductive because the schools become associated with failure, thus dampening hope for future passage. The lesson? Do what is necessary to build a winning track record.

If your review indicates the YES vote strategy won't work because there are simply too many NO votes in the community, then rely on the community crusade.

The goal of a YES vote campaign is to identify school supporters and make sure their ballots are cast on election day. The task in a com-



The seriousness of our financial dilemma was overshadowed by our inability to improve our district's credibility within the community. Our most recent attempt at the polls had resulted in a resounding defeat by a margin of nearly two to one. The district had gone 13 years without passing an operating levy. . . . The Board of Education recognized the need to continually validate our critical financial picture and to remedy any school management credibility problems that may have existed. For these reasons, the Board conducted four financial audits and a comprehensive "excellence" audit of our district. . . . The Excellence Audit provided us with information that the community wanted to see more strategic planning, a more publicized sense of direction for the district, and a more visible and assertive management team. The audit also demonstrated strong support for the Board which had just reduced the projected deficit by 25 percent through across-the-board staff and program reduction.

Timothy G. Nusbaum, speaking on "The Use of Internal and External Marketing To Turn Critics into Fans," 1987 NSBA Convention, San Francisco, CA.



The South Carolina School Boards Association notes that successful campaigns have three broad common denominators. They are: highly organized, child-centered and involve the entire community. Additionally, it suggests that school districts analyze their community to see if the "climate is right" before pursuing approval of the voters.

Jeannie M. Henry, "Help for Passing Bond Referenda," *School Business Affairs*, (Dec. 1987), p.26.

Another major preparatory step is consultation with community influentials to ascertain their views and solicit their support prior to making the decision to call an election or at least before announcing it.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.95.

munity crusade is identical except for an important addition to the plan: convert real or potential NO votes to YES votes, or at least persuade opponents not to vote.

The community crusade is a harder campaign to wage. More planning and implementation time is required. The amount and difficulty of the work make it less desirable except in small rural districts where school support is high. Then a community crusade is no more taxing than a YES vote campaign and requires little if any extra time and resources.

ORGANIZATION

The blueprint for a community crusade, similar to a YES vote campaign, requires campaigners to identify school supporters and then remind them to vote on election day. The campaigns differ in their levels of community involvement. A community crusade, as the name suggests, depends on the support of many (hopefully all) of the influential groups in the community. Specifically, the goal of the campaign is to obtain endorsements and volunteers from each organization's leadership. This includes the news media, service clubs, Chamber of Commerce, Farm Bureau, and others.

Secure this support before starting the volunteer recruitment phase. (See *Exhibit W* for a sample community crusade timeline.) A community crusade might take three or four months longer than a YES vote campaign due to the time consuming endorsement process.

ENDORSEMENTS

Compile a list of influential organizations that includes the names, addresses, and telephone numbers of the group leaders. For help in locating the organizations, consult members of the school board, staff, and others familiar with the community. Do not overlook the various service clubs, businesses, and even special interest and hobby groups. Give special attention to any group that uses school facilities or that maintains an active connection to a school association. Occasionally these groups can open doors to other organizations that are difficult to approach. For example, an amateur astronomy club holds meetings at the local high school. Its membership includes the president of the realtors association, two civic association presidents, and an editor of an area newspaper, all of whom are opinion leaders in their respective circles. As regular "users" of school facilities, they might be ready-made supporters of whatever the schools are promoting (including a referendum).

Identify an information contact for each organization, someone with a good knowledge of the group's leaders and membership concerns. To find contacts, look among the ranks of board members, staff, friends, or neighbors. Start with the most influential organizations. Ask each resource contact for advice on the best appeal to make to the group's leadership.

Next, rank the organizations according to their likely influence on the election outcome. Starting with the most influential ones, set up private meetings with their respective leaders for the purposes of explaining the referendum issues and answering questions. End the meeting by requesting an endorsement and a list of volunteers. Remember that recruiting volunteers is as important as winning the endorsement: set your sights on both.

Typically neither is produced on the spot. Usually the group's executive committee, board, or general membership must approve the action. Therefore, during the first two weeks of the endorsement phase, schedule as many initial meetings as possible with different organizations. Follow-up meetings should continue until you receive both the endorsement and the names of volunteers, even if the process takes a month or more. Although patience and time are essential to success, keep gentle but firm pressure on the leaders to assure continuing progress.

Do not allocate more than three months to complete this phase. As with any campaign, community crusades should not go on indefinitely. People lose interest. To prevent this, convey a sense of urgency during the one-on-one presentations. If leaders are reluctant and fail to set the wheels in motion, turn your attention to other potential endorsements but keep open the lines of communication. Once the school ballot becomes the local "bandwagon," the organization might jump on in support. Even if the endorsement is not made during until the final week of the campaign, accept the help and capitalize on the action if you can, but in any event don't forget to express your thanks.

Another method is to invite board members, some members of the campaign steering committee, or other influential friends to these meetings. Work on joint presentations. It is unimportant who has the larger role. Depending on the popularity and stature of your superintendent, arrange for the school chief to attend. His or her presence at these meetings (similar to the superintendent's appearance at coffees) stresses the gravity and importance of the school ballot and also ensures that most, if not all, questions are answered on the spot.

During meetings give a straight-forward account of the circumstances leading up to the referendum. Afterwards make an appeal for the group's support. Sometimes the basis for the appeal is obvious; at other times rely on the advice of your contact person. Some situations require taking an instinctive approach based on the progress of the meeting. Possible appeals include educational needs, better opportunities for children, or pocketbook reasons such as long-term savings (compared to delaying the projects another year) or the efficient use of limited resources. If possible try to tailor the appeal to the specific concerns of the organization.

Focusing the appeal on the needs and interests of each group may bother some school campaigners. It shouldn't. The appeals are credible and the voters will decide the fairness of the proposed funding requests. A good school system *does* boost property values and enhance the community's attractiveness to businesses considering relocation



Do all you can to make the people in your school district consistent heroes and winners. Help them understand that they are the image of the school district—24 hours every day.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.



Good media relations will hopefully pay off with an editorial written in support of the referendum.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.14 (preface).

This position [steering committee chairman] demands the appointment of an individual who has time to donate, who is a stickler for details, and who commands respect in the community.

Referendum Kit, (South Carolina School Boards Assoc., 1988), p.9 (preface).

sites. The future of our society *does* depend in large part on the education and school experiences of America's children.

All members of the community either directly or indirectly *are* affected by schools. Education *is* an economic force affecting the lives of employees, suppliers, service industries, the news media, and others. Use these arguments whenever possible. In some campaigns, community pride also makes an effective appeal.

Early in the campaign, list as many different appeals as possible. Before scheduling meetings with community leaders, familiarize yourself with the arguments for the referendum and the possible appeals that seem to be appropriate for the groups' leaders. Then during the interviews observe carefully the leaders' reactions and revise the content and format of your presentations based on what you see and hear. Remember, the purpose of this activity is to secure endorsements and volunteers from all influential organizations in the community.

During this process consider asking elected officials for endorsements. In small stable communities, political figures often have immense public stature. (Endorsements are recommended in community crusades but not in YES vote campaigns.) The need to generate overwhelming support for the school ballot makes this a viable strategy in community crusades.

Ask only the most popular figures, however. Avoid controversial names or at least downplay their participation. If possible, seek endorsements from officeholders of both parties. Do not allow the school election to become a partisan issue. Along with endorsements, request the help of the official's campaign volunteers. If the politician offers one or the other, always take the campaign workers. These volunteers are politically seasoned and know how to conduct winning campaigns.

The news media play a more important role in a community crusade than in a YES vote campaign. When the endorsement phase begins, contact local newspapers and radio and television stations. Ask for their assistance in three ways:

- Endorsements.
- Publicity (e.g., public service announcements and editorials).
- Stories and broadcasts on the endorsements made by other organizations.

If the press agrees to cooperate, be sure to follow-up by releasing quality information. Become familiar with press and media deadlines and lead time requirements so that the information flow will proceed smoothly.

TIMING

A community crusade must "build" from day to day until reaching a final point of impact on election day. The sense of urgency and excitement should grow daily. Therefore, the public relations aspect of the campaign is paramount to election success. Release public announcements according to a carefully crafted plan. For example, you would commit a grave mistake by issuing a news release once a week during the 26-week campaign. Soon voters will expect the news and pay little attention.

Also, do not start the public campaign more than a few weeks before the election. It is important to convey a sense of growing public support for the referendum. As the campaign progresses announce endorsements more frequently but in reverse order of the organization's influence. (Consult your initial prioritized list.)

Effective timing has two goals: to reinforce YES voters and to convince potential NO voters either to stay at home or to vote YES. Converting a NO vote to a YES vote is difficult to achieve. Instead try to discourage NO voters from going to the polls by making them feel it would serve no purpose. If NO voters observe a rising tide of school support in press accounts and at community events, they will avoid being associated with a losing effort. If the school campaign looks like a winner from the beginning, you are the odds-on favorite to win on election day.

Remember, the need for endorsements does not override the volunteer recruitment and YES vote activities discussed in Chapter 7. When the endorsement phase is complete, the two other activities begin. Gradually publicize the endorsements and then identify school supporters. This phase usually begins from three to five weeks before the election.

Never forget that a community crusade is a YES vote campaign *plus* an endorsement phase. Don't forget the YES voters! Elections still are won by YES voters going to the polls—not by NO voters staying away! It follows that all the methods designed to increase YES voter turnout are essential parts of the community crusade, such as friend-to-friend cards, telephone and door-to-door canvassing, and reminders to vote. In community crusades you might want to increase the amount of door-to-door canvassing, but, with the one exception, the other strategies—including the election-day precinct work—remain the same.



Election day will eventually come, but the campaign won't end. Winners set the stage for their next election by conducting a thorough evaluation. They study voter turnout records. They learn who voted. They assess whether the voters were male or female, parents or people without children in school. . . .

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.

CHAPTER 9

SPEECHES

There are speeches, and then there are speeches. Good ones can build support for a campaign; bad ones can devastate a campaign. So a few words of caution are in order.

First, avoid accepting invitations to make a speech to a large audience if at all possible. It is much easier to sell an idea to an individual or to a small group than to a large audience, so focus your efforts on the leaders of community organizations—not on the groups' total membership.

Second, if a speech is inevitable, make certain that the person delivering the speech has an established track record as an effective, stimulating speaker. Merely being chairman of the school board or superintendent of schools doesn't necessarily qualify one to be a good public speaker. Ability to speak is, therefore, far more important than title or status.

Third, use the "KISS" rule of speech-making: keep it short and simple. Limit any speech to ten minutes maximum. Inform the audience about the basic benefits of the referendum objectives, the major costs involved, and the reasons why their support is essential. Tailor parts of the speech to the group's particular interest. Make the talk as personal as possible. Good speakers establish a bond or a rapport with their audiences. Avoid the temptation to read long laundry lists of "things" the referendum would pay for or to describe in detail the new buildings or programs. A simple, straightforward presentation free of education jargon stands a chance of being heard by the audience, particularly if delivered forcefully and energetically. A long speech—especially one delivered unenthusiastically serves only to add to the NO vote totals.

Fourth, make additional details available in written form. Campaign brochures or specially developed fliers for the speaking engagement should contain the essential background sought by truly interested members of the audience. In short, the speaker need not depend upon the spoken word, alone, to convey information.

And fifth, use audio-visuals only if the speaker is skilled in their use—and is capable of moving ahead with the speech, unhesitatingly, if a projector lamp burns out or a waiter knocks over a tray of slides.



Whether speaking opportunities are actively sought, expect requests for public discussions of the finance measure. Many civic, social, employee and religious groups sponsor voter awareness projects. So have speakers and materials ready. Referendum Kit, (South Carolina School Boards Assoc., 1988), p.17 (preface).

CHAPTER 10

CAMPAIGN BUDGETS

Both the YES vote and community crusade campaigns are intensive but not always expensive because they rely heavily on contributions of time and services. A successful YES vote campaign can be waged on a budget of a few hundred dollars. The largest amounts of money are needed for printing the brochures and information sheets sent to volunteers. Also, allocate enough funds to cover the costs of any mailings to campaign workers.

The issue of spending public funds on a referendum campaign is an important one. Many state laws specifically address this issue while others leave the matter to the courts. In general, public funds can be expended to provide citizens with information on the ballot requests. Acceptable categories include facts on tax impact, project descriptions, alternatives to the ballot requests, and what will happen if voters do not pass the referendum.

Public funds should not be spent to promote the ballot or, in other words, to persuade voters to cast a YES or NO ballot. Often the manner in which the information is presented determines whether the activity is classified as informational or promotional. For example, the words "Vote YES!" or a vivid picture of pupils being turned away from an overcrowded school would make the brochure promotional and quite possibly would require financing entirely from non-school funds.

Also consider the use of school facilities and equipment by those involved in the campaign. Most judicial rulings require that all concerned parties (the NO campaigners as well as the YES campaigners) be allowed to use public resources if school supporters have the same privilege. Such resources would likely include photocopying machines, printing equipment, office space, telephones, and supplies.

Some state courts have ruled that public officials authorizing such expenditures (but not opening school facilities to other interested parties) must reimburse the school budget. Other courts have limited personal liability to cases where officials failed to exercise due care, a less strict standard. Make sure to consult school legal counsel on this matter before allowing school campaigners to use public facilities and equipment.

Unless a generous school supporter donates office space or a portion of a home to the campaign, earmark funds for rent and telephone service. Even when these items must be financed, the campaign budget need not be large and usually can rely on contributions from board members, school employees, and interested citizens.



But the government also must depend, for its continued legitimacy and public support, on the acceptance of its policies by the citizens, or at least by a majority of those who vote for officials and in referenda. And to allow the use of public monies to create the basic acceptance undermines its authenticity. For that reason, promotional expenditures are improper.

David M. Lawrence, "Use of Public Funds in Bond Referendum Campaigns," *Voice*, (North Carolina School Boards Assoc., October 1988), p.13.

Normally the campaigns are relatively inexpensive. School boards are barred by statute from dipping into the treasury and they must rely on donations and volunteers.

Usually there is an abundance of volunteers; PTAs, individuals, and business firms donate services as well as a little cash, and they frequently pay for newspaper advertising and printing bills.

Howard D. Hamilton and Sylvan H. Cohen, *Policy Making by Plebiscite: School Referenda*, (Lexington, MA: Lexington Books, 1974), p.100.

Where a particular item falls can depend as much on the tenor of its message as on the message itself. For example, in a New Jersey case the court disapproved of a school board's "over-dramatized" depiction of what would happen if the school bond issue failed.

David M. Lawrence, "Use of Public Funds in Bond Referendum Campaigns," *Voice*, (North Carolina School Boards Assoc., October 1988), p.14.

CHAPTER 11

FOLLOW-UP ACTIVITIES

SAY THANKS

It is the day after the election. The referendum is over and, regardless of the outcome, now is the time to say "thanks" to campaign workers. Persons to thank include volunteers from the school family: board members, teachers, and staff. Even more importantly, thank volunteers from outside the school community who found time to help with duties such as telephoning, volunteer recruitment, and precinct work. Send each a note of thanks that is personally signed by the campaign manager.

If the campaign received endorsements from the news media or from local organizations, thank them as well. If appropriate, consider writing a letter to the editor thanking voters for their support.

It is good manners and smart politics to say "thanks." After all, it's just a matter of time until you or someone else will be asking the public for their support again. It is not too soon to lay the foundation for the next effort.

KEEP RECORDS

Preserve as complete a record as possible of this election. When the next campaign rolls around, you'll appreciate the easy access to past experiences. Also, planning time is reduced if the previous campaign's basic data are available readily.

Good records help ensure that all appropriate people are thanked. Keep an accurate and thorough inventory of the campaign workers and their respective assignments, including volunteers who made only small or short-term contributions.

Keep records of the neighborhoods canvassed, the number of postcards mailed, and copies of the YES voting lists for each polling place. Try to preserve a record so complete that in ten years someone unconnected with the referendum could look at the file and understand what was done and with what results.

Your file should include:

- The campaign plan.
- A precinct by precinct tabulation of votes.
- A precinct by precinct analysis of votes.
- The projected and actual campaign timelines.
- Names, addresses, and phone numbers of volunteers.



Winners always say thank you to their supporters. But during the campaign they spend most of their time with marginal voters—people leaning toward YES but not quite there.

William J. Banach, "Here's to the Winners," *Tennessee School Boards Journal*, (Summer 1986), p.18.

- Arrange for personal and public expression of thanks to the community and to the many citizens and staff who worked on the campaign.
- Immediately assess future tax needs and project amounts and dates for the next tax election.
- Keep a post-election work group or committee active that can complete tasks crucial to the next tax effort.
- Determine the most active and supportive precincts or areas.
- Analyze why some people on the YES vote list did not vote. Plan strategies to counter this phenomenon before the next election.
- Update and validate the YES vote list, cull those who move or who are not showing support for school programs. Add positive individuals whose behavior indicates support of the schools.
- Continue to use a variety of media to communicate with the general public about the positive aspects of the school program. As often as possible, make a direct tie or link between the requested tax and quality instruction.

William F. Kromer, "The Election is Over, What's Next?" *Michigan School Board Journal*, (June 1988), p.23.



Begin to formulate the basic strategies for the next election campaign and develop a timeline that builds on planned events leading to greater public awareness and acceptance of the need for voted levies.

... it is crucial that effective post-election initiatives be completed after every successful and unsuccessful election.

Your post-election activity is really the beginning effort for your next election. And, you cannot squander the opportunity to get moving towards your next millage success. The key ingredient to success is a year-round effort that requires action on the heels of completed campaigns.

A successful millage election is not over when the celebration winds to a halt. Many questions need to be answered and many activities need to be accomplished after the election. To begin with, the district must now implement programs that the millage was voted to finance. That in itself is a major task and, unfortunately, it sometimes prevents some crucial post-millage initiatives from being accomplished.

William F. Kromer, "The Election is Over, What's Next?" *Michigan School Board Journal*, (June 1988), p.23.

- Names, addresses, and phone numbers of organizations making endorsements.
- Logs of telephone and door-to-door canvassing activities.
- Donations, name of donor, and amount of gift.
- Copies of campaign literature and material sent to volunteers.
- Record of volunteer training activities.
- Samples of correspondence to volunteers and reminder to vote postcards.

The records should be compiled immediately after the election. It is important to analyze the election results while the memory of the campaign is still fresh. Start with the precinct lists of prospective YES voters:

- How did the number of projected YES voters compare to the final tally?
- Were campaign projections of voter turnout accurate? Some differences between the projected and actual numbers are expected. But if the variation is significant, find out why. For instance, did the poll watchers or telephone callers encounter unexpected problems? If so, what were they?

No election is over until the participants have been thanked and the final vote analyses have been made. When these tasks are finished, turn your thoughts to the next election!